



European Union

European Regional
Development Fund

Marches Renewable Energy Scheme Summative Assessment

**Delivery Area: Telford & Wrekin, Herefordshire
and Shropshire**

9 September 2021



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Executive Summary

31 July 2021

Project	Marches Renewable Energy Scheme
Time period	1 January 2019 – 31 December 2021
Areas covered	Telford & Wrekin, Herefordshire and Shropshire
Project Value	£2,291,539
Additional capacity for renewable energy production	2.12MW
Estimated annual decrease of GHG	510 tonnes of CO ₂ e
Number of enterprises receiving support	35
Support available to organisations	50% grant towards the cost of installing renewable technologies

1. Project Context

1.1 Introduction

In June 2021 Paula Rogers Consulting was commissioned by Herefordshire Council to conduct a Summative Assessment of the Marches Renewable Energy Scheme ('the MarRE Project'). The Summative Assessment was completed 9 September 2021.

The MarRE Project sought to accelerate the deployment of renewable energy projects across the Marches and address the decline in renewable energy deployment.

1.2 Objectives

1.2.1 The overall objectives of the Summative Assessment are to gather evidence in order to assess the:

- Continued relevance and consistency of the Project.
- Progress of the Project against contractual targets.
- Experience of delivering and managing the Project.
- Economic impact attributable to the Project.
- Cost effectiveness of the Project and hence its value-for-money.

1.2.2 This Summative Assessment Report provides:

- A review of European Regional Development Fund (ERDF) Claims, Change Requests, Reports and Project performance data from 1 January 2019 to 30 June 2021 and forecasts to 31 December 2021.
- Progress and performance against the projected Project deliverables in comparison to the Project's original targets.
- Data and information gathered from the Project Team and stakeholder consultations and beneficiary surveys.
- Conclusions on delivery, performance and impacts.
- Recommendations on how to improve and expand similar activities that could be supported in the Government's future funding arrangements.

1.2.3 The intended audience of the Summative Assessment is:

- The Managing Authority, Ministry of Housing, Communities & Local Government (MHCLG)
- The Project Lead Organisation, Herefordshire Council
- Project partners, Telford & Wrekin Council and Shropshire Council
- Other interested partners, outside of the Project and would include The Marches LEP, The Marches Growth Hub, The Marches Business Boards, energy projects operating in The Marches (including Worcestershire Business Energy Efficiency Programme (BEEP) The Marches Sustainable Energy in Public Building (SEPuBu) and sustainable energy groups and organisations (including Partners for Social Enterprise, The Marches Energy Agency)
- Other organisations providing business support to businesses in The Marches.

The Summative Assessment provides the relevant information for the audience to understand how the Project has performed. The Summary Findings Template will be available alongside the Summative Assessment.

1.3 Evaluation Methodology

1.3.1 The Report is part of the wider Summative Assessment process, which is based around three phases, these being:

- Stage 1 – Summative Assessment planning - Preparation of the Logic Model and The Summative Assessment Plan - This process has been completed by the Lead Organisation. The Logic Model is attached in Appendix 1.
- Stage 2 – Data collection and reporting on the ERDF programme’s monitoring requirements – ongoing until 31 July 2021.
- Stage 3 – Reporting and Communication - Completion of the Summative Assessment – to be submitted to the Lead Organisation by 9 September 2021.

1.3.2 The framework for the evaluation is provided within the Project’s Logic Model developed at the Project’s inception. The Logic Model shows the link between the investment in the MarRE Project, the Project output targets and predicted outcomes and impacts (attached at Appendix 1).

1.3.3 The Summative Assessment reports on outcomes and impacts achieved by 30 June 2021 and forecast to 31 December 2021.

1.3.4 The documentation and data review were undertaken to provide an understanding of the Marches Renewable Energy Scheme’s:

- Aims and objectives.
- Delivery management, activities and the delivery structure.
- Impact in terms of projected and achieved spend and outputs.

1.3.5 The documentation and data reviewed included:

- ERDF Full Application.
- Project Claims.
- Project Change Requests.
- Reports to the Project Steering Group and Project Board.
- The Marches LEP Strategic Economic Strategy (2019) or SEP and The Marches Energy Strategy and Implementation Plan (July 2019) and the area’s most recently adopted policy document which complements the SEP, The Marches Local Industrial Strategy (April 2020).

1.3.6 Face to face meetings were conducted with The MarRE Project Team. Further consultations via email and telephone calls were conducted with Shropshire, Telford & Wrekin and Herefordshire Councils, The Marches LEP, the MarRE Project Steering Group, MarRE Project Board and other stakeholders. A full list of consultees can be found in Appendix 2.

- 1.3.7 A survey was undertaken with beneficiaries. Beneficiaries were emailed by the MarRE Team, providing a link to complete an online survey. Due to budgetary limitations, organisations were not included in the survey where projects were either unsuccessful or withdrawn. The survey questions and responses are attached in Appendix 3.
- 1.3.8 The survey was undertaken to assess the support beneficiaries received and the overall impact of the Project. The response rate was considered very good and representative of beneficiaries participating in the Project. Table 1 below outlines response rates for the beneficiary consultation.

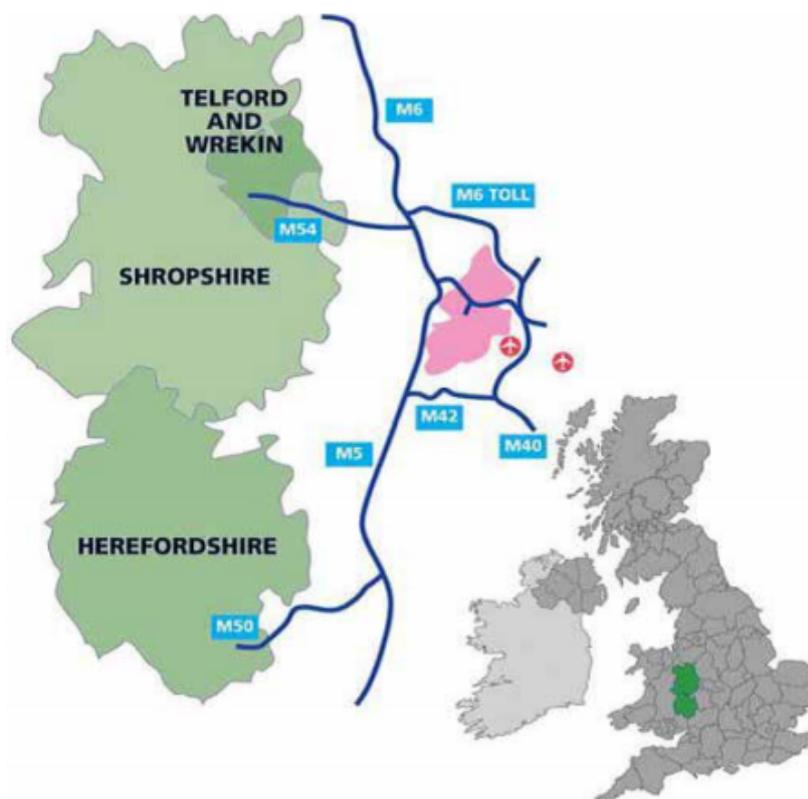
Table 1: Beneficiary Survey Response Rate

	Numbers of Beneficiaries Surveyed	Completed Surveys	Response Rate (%)
MarRE Beneficiaries	41	27	65.8%

1.4 Project Context

- 1.4.1 The ERDF contract was awarded by MHCLG to Herefordshire Council on behalf of Herefordshire Council, Telford & Wrekin Council and Shropshire Council and operated across The Marches area from 1 January 2019 to 31 December 2021 (36 months).
- 1.4.2 The map below indicates, in green, the Marches LEP area where the MarRE Project operated (Herefordshire, Telford and Wrekin and Shropshire).

Map1: The Marches LEP Area



- 1.4.3 The England ERDF Programme spatially concentrates investment in order to address persistent disparities in economic performance across Less Developed, Transition and More Developed regions. The Marches LEP area is split into two regions; the Transition Region (Shropshire and Telford & Wrekin) and the More Developed region (Herefordshire). ERDF resources allow up to 60% of funds in Transition regions and up to 50% of funds in More Developed regions.

- 1.4.4 The MarRE Project was funded from Priority Axis 4a (Promoting the Production and Distribution of Energy Derived from Renewable Resources) of the ERDF Operational Programme (2014 – 2020).
- 1.4.5 MarRE’s total budget was £2,291,539, of which ERDF contributed £1,284,064. The ERDF contribution was split between the Transition Region of Telford & Wrekin and Shropshire (£829,755) and the More Developed Region of Herefordshire (£454,309).
- 1.4.6 As part of the delivery process projects can submit Project Change Requests (PCR) to MHCLG for consideration. PCRs provide MHCLG with a rationale to change the delivery of the Project, which can impact on the original spend and deliverable targets associated with the Project. MarRE submitted two PCRs in May 2019 and September 2020. The first PCR has been approved by MHCLG and the second PCR is awaiting confirmation of approval from MHCLG (although this has been verbally approved). The first PCR related to the unforeseen delay due to time taken in the Project sign-off process. The Project was originally programmed to start 1 January 2019 and be completed by 30 June 2021. The Project completion date was moved forward by 6 months to 31 December 2021. All expenditure and output profiles remained the same and were re-profiled accordingly. The second PCR related to the removal of Project output ER/C/O/C32 (‘decrease of annual primary energy consumption of public buildings’). This was in response to the Project not including support towards energy efficiency measures and the ERDF Project ‘Sustainable Energy in Public Buildings’ in the Marches region delivering against this output.
- 1.4.7 Table 2 provides a breakdown of Project activity and associated costs:

Table 2: Project Activity and Associated Costs

	Original Budget	
	Revenue	Capital
Internal Costs		
Salaries	£139,599	
Marketing	£3,000	
Consultancy	£6,000	
Other Staff Costs	£2,000	
Overheads	£20,940	
External Costs		
Renewable Energy Projects		£2,120,000
Sub-Total	£171,539	£2,120,000
Total	£2,291,539	

- 1.4.8 Match funding comprised a combination of public and private sector leverage.

1.5 Policy Context

1.5.1 European

The MarRE scheme is funded through the Priority Axis 4, ‘Supporting the Shift Towards a Low Carbon Economy in All Sectors’ of the ERDF England Operational Programme. The primary aim of this Priority Axis is to move England’s economy towards a low carbon model by reducing the levels of Green House Gas (GHG) emissions, increasing the share of renewable energy and enhancing the energy efficiency of homes, businesses and transport.

1.5.2 National

The Government’s Industrial Strategy Green Paper of January 2017 sets out ten pillars to drive UK growth, including a particular focus on science, research and innovation. The Green Paper also identifies a number of ways in which investment in energy infrastructure and support for the low carbon economy would play an important role in delivering the country’s growth ambitions.

The Government's Industrial Strategy White Paper in November 2017, 'Building a Britain Fit for the Future, 2017', provides an ambitious vision for the future, setting out how productivity will be raised across every sector, how skill levels and wages will be increased and living standards improved across the country. The Industrial Strategy identifies four grand challenges that the UK economy will need to address if businesses are to remain competitive in an increasingly global race, these are:

- i. Maximise the advantages for UK industry from the global shift to clean growth;
- ii. Put the UK at the forefront of the artificial intelligence and data revolution;
- iii. Become a world leader in shaping the future of mobility; and
- iv. Harness the power of innovation to help meet the needs of an ageing society.

The Clean Growth Strategy details how the UK will grow the national income while cutting greenhouse gas emissions, in line with the target to reduce carbon emissions by 80% by 2050 and the five year carbon budgets leading up to that. The Clean Growth Strategy covers the period up to and including the fourth and fifth carbon budgets, leading up to 2032.

A number of commitments are made as part of this strategy including:

- Improving business and industry efficiency;
- Improving homes;
- Accelerating the shift to low carbon transport;
- Delivering clean, smart, flexible power.

1.5.3 The Marches

(i) The Marches Strategic Economic Plan (SEP) (2019) supports a shift towards a low carbon economy with a focus on:

- Sustainable and balanced growth.
- Supporting low carbon and renewable energy supply chains.
- Providing opportunities for the development of energy efficiency, waste reduction and renewable energies in communities.
- Increasing the use of renewable energy, decreasing energy use and promoting smart energy systems.

Marches Environmental Technologies and Services industries provide a nationally significant presence, including a number of market-leading companies and cutting-edge enterprises. They encompass green & clean technology, renewable energy generation, the application of environmental sciences, environmental monitoring and the use of electronic devices in management of our natural environment & assets. The SEP highlights the following Marches-specific opportunities to be at the forefront of progressing carbon reduction alongside economic growth:

- Currently leading the UK in anaerobic digestion technology by managing waste from agriculture & food, producing fuel and generating renewable energy, providing practical demonstration in by-product synergy and the circular economy.
- Large scale opportunities solar photovoltaic roll out in homes, commercial premises and solar farms, linking to the nascent energy storage sector including kinetic energy storage and compressed gas.
- National & International showcase for Natural Resource Management and Natural Capital Management building upon the work of key local assets such as Marches Nature Partnership, the Centre for Research into Environmental Technology (CREST) at University Centre Shrewsbury and Harper Adams University; using energy efficiency techniques; energy requirement minimisation; waste & air management; and environmental sensors.
- Ambition to become a national leader in natural resource management, starting with water through, for example, the ongoing ERDF funded Freshwater First project and University of Birmingham work on the Marches Ecosystems Assessment.

The Marches SEP and the key findings from The Marches LEP Energy Strategy (2018) established ambitious targets in achieving the area's economic growth potential by:

- Create 1,000 new jobs in the low carbon sector by 2030
- Moving to 50% renewable electricity generation by 2030.
- Reducing 1990 carbon emissions by 57% by 2032
- Lowering fuel poverty to below 10% by 2030.

(ii) The Marches Local Industrial Strategy (April 2020)

The Marches Draft Local Industrial Strategy (LIS) provides the latest Board-adopted policy document providing insight into economic growth opportunities across the area. It recognises the imperative of using the transition to zero carbon to promote inclusive economic growth to benefit all residents, to adapt to climate change and protect the high-quality natural environment. The document notes that Marches has the research and expertise needed to capitalise on major growth opportunities of:

- Ensuring future competitiveness & success in high-tech, energy efficient manufacturing and engineering;
- Securing future food supply chain and achieving modern and environmentally sustainable production, packaging and distribution through agri-tech innovation; and
- Developing world-renowned excellence in cyber-security and resilience.

The LIS sets out further detail of how the area will use its existing business strengths and area-based assets to provide a successful "living lab" for modern high-tech and environmentally sustainable methods of:

- Food production, processing, packaging & distribution
- Natural capital, soil, water and waste management
- Carbon sequestration
- Energy Use

The LIS notes that all three local authorities have declared a climate emergency, committing to becoming net carbon zero counties by 2030 and references support and expertise of anchor institutions in meeting carbon reduction targets and delivering on the targets set out in the Strategic Economic Plan. The MarRE Project certainly maintains relevance within the current policy context, which sets the scene for increasing interventions which support reduction in carbon emissions.

(iii) The Marches LEP Energy Strategy (launched July 2019)

The Strategy, funded by the Department for Business, Energy and Industrial Strategy (BEIS), recognises that the way energy is generated and consumed in the UK is changing and the challenges that will need to be faced. The current energy infrastructure is already at capacity in many areas, and this presents both a threat to future business and housing development. There is an opportunity to invest in innovation that can overcome these challenges while providing a unique selling point for those in the energy supply chain to invest in the area.

The 10-year Energy Strategy and Implementation Plan aims to address many of the issues surrounding energy management in the Marches region.

The objectives of the strategy were to:

- Identify barriers to growth from current energy infrastructure.
- Highlight opportunities for the Marches to deliver its growth potential through innovative and low carbon related business opportunities
- Develop an achievable action plan required to mitigate risks and capture the opportunities for the Marches that come with change in the national energy system

Key findings included:

- There is significant potential for renewable generation including biomass, solar, wind and anaerobic digestion.
- A significantly constrained electrical grid both in terms of generation and supply leading to difficulties in connecting both new development and energy generation assets.
- The Marches is already a national leader in the deployment of anaerobic digestion plants.
- The rural nature of the area results in:
 - Comparatively high transport emissions as vehicles have to travel further to their destinations.
 - Significant areas off the gas grid leading to the relatively widespread use of high carbon and high-cost fuels.
 - Above national and West Midlands average levels of fuel poverty.

(iv) The Marches European Structural and Investment Fund Strategy (2014 – 2020)

The Strategy mirrors the Marches SEP by identifying ‘Supporting the Shift Towards a Low Carbon Economy’ as one of its five Strategic Activities.

Through this Strategic Activity, the Marches sought to encourage Projects that addressed four themes. The MarRE Project specifically addressed the theme ‘to encourage ERDF investment into an integrated and strategic approach that will develop and implement proposals to increase the use of renewable energy, decrease energy use, and promote smart energy systems. Activities that help local businesses and communities reduce their costs through the deployment of resource efficiency measures and energy saving advice leading to the adoption of energy efficient technology and measures, including community energy projects.’

1.6 Project Context Analysis

An analysis of the developing policy context over the project delivery time period indicates that the MarRE Project increased in its relevance in relation to government policy and the needs of local organisations. The Project should be examined as a “Pilot Project” for the area, providing part of an evidence base for subsequent projects aimed at increasing environmental efficiency and supporting reductions in carbon emissions.

2. Project Overview

2.1 Project Aims and Objectives

- 2.1.1 The overall aims and objectives of the MarRE Project were to develop new renewable energy projects, support and educate businesses, local authorities and communities to reduce CO2 emissions and to increase resilience through promotion of energy efficiency measures.
- 2.1.2 The Project provided an incentive for organisations in the Marches (including Local Authorities, Statutory and non-statutory public funded organisations/bodies, Higher and Further Education Institutions, Voluntary/Community organisations, Private sector companies, Registered charities and Not for Profit organisations) to install renewable technologies. Technologies supported were expected to be in the range of 4-200kWp (system kilowatt peak) and included wind, solar, aerothermal, geothermal, hydrothermal, hydropower, biomass, landfill gas and sewage treatment plant gas and biomasses.
- 2.1.3 Grant was awarded at 50% of total costs and operated under the GBER Aid for Environmental Protection – Investment Aid for the Promotion of Energy from Renewable Resources. Thresholds on installation costs were not stipulated as part of the grant application process and total cost of projects (approved and committed) ranged between £5,085.60 and £161,630.06 with 50% grant funding ranging between £2,542.80 and £80,815.03. The average total cost of an installation was £25,390.63.

2.2 MarRE Activity

- 2.2.1 The MarRE Project commenced 1 January 2019 and is anticipated to be completed by 31 December 2021. The key Project activities were provided in the Project logic Model as being:
- Invite Expressions of Interest.
 - Governance Steering Group and Project Board Meetings.
 - Grant applications.
 - Install renewables.
 - Marketing, publicity and case studies.

The Project included a grant scheme, providing a 50% grant towards the installation of new renewable technologies which could include wind, solar, aerothermal – including air source heat pumps, geothermal – including ground source heat pumps, hydrothermal, hydropower, biomass and landfill gas

The Project outcomes were as follows:

- Support the deployment of 2.12MW of renewable installation.
- Provide a grant of 50% towards the cost of the renewable installation.
- Decreased carbon emissions from applicants in the Marches.
- Benefit the renewable energy supply chain, in and around the Marches and in turn benefit the skilled jobs market.
- Improve the energy security of grant applicants and will contribute towards the delivery of the Marches Energy Strategy.

2.3 Market Failure

- 2.3.1 The Renewables Obligation certificates (ROCs) and Feed in Tariffs (FITs) scheme played a crucial role in supporting the accelerated deployment of commercial and small-scale renewables in the UK. However, the closure of ROCs in 2017 and the continuous restructuring of FITs meant there was a much lower level of take-up. The restructuring of FIT's saw non-domestic solar PV installations decline 77% from 2016-2017 in the Marches.

The extensive deployment of solar PV across the UK has become increasingly visible to the public at all scales and DECC (BEIS) in their 2013 Roadmap update stated that the Government did not expect on-going deployment of the technology to continue at all scales. The Government took action to align the support mechanisms under the FITs scheme and the RO to reflect the current costs of solar PV installation.

The reduction in FIT's added to the barriers in the wider take up of solar PV by business and community groups including the ability to access capital, the transaction costs (management time), prioritisation of other issues, suitability of the building stock, and split incentives, primarily landlord/tenant issues.

2.3.2 The Project sought to address a strong market failure in The Marches by filling the gap left by the FITs regime and continue to offer financial support for renewable technologies across The Marches at a time when the installation of renewables was not feasible as a business investment without financial support such as the FITs, as evidenced by the drop off in renewable installations.

2.3.3 The Project provided an excellent solution in addressing this market failure by providing financial support relevant to The Marches' needs.

2.4 Project Strategy and Alignment

2.4.1 The Project is regarded as sitting well within Priority Axis 4 (Supporting the Shift Towards a Low Carbon Economy in All Sectors) of European Regional Development Fund England Operational Programme. The primary aim of this Priority Axis is to address the challenge to move England's economy towards a low carbon model by reducing the levels of Green House Gas (GHG) emissions, increasing the share of renewable energy, and enhancing the energy efficiency of homes, businesses and transport is one which impinges on all territories across the country.

2.4.2 The Project took its strategic direction from The Marches Strategic Economic Plan and Energy Strategy, focusing on eligible priorities that supported growth in renewable technologies. The Project has aligned with other renewable energy programmes in the area including Worcestershire Business Energy Efficiency Programme (BEEP).

2.5 Delivery Model

2.5.1 MarRE has been managed by Herefordshire Council in partnership with Telford & Wrekin Council and Shropshire Council. Herefordshire Council has a long track record of delivering successful ERDF projects. The three local authorities have all worked collaboratively on other ERDF Projects including The Marches Growth Hub Project. The three project partners were represented on the Project Steering Group and Board, who held regular meetings (monthly where possible).

2.5.2 The Project was delivered by Herefordshire Council, comprising the MarRE Project Manager (full-time) who was appointed in August 2019 and approximately 0.5 full-time equivalent support from Herefordshire Council's Delegated Grants and Programmes Team. The Delegated Grants and Programmes Team submitted timesheets, with an agreed hourly rate, for the time used on the Project. The Project commenced in January 2019, however due to unforeseen contracting delays the actual start date of the Project was 1 July 2019. A 'soft launch' was undertaken for Herefordshire following the start of the Project in July.

2.6 Management and Governance

2.6.1 The Project is governed by the MarRE Steering Group (Sub-Group of the MarRE Project Board) responsible to the Project Board for oversight of the delivery and performance management of the Marches Renewable Energy Project. The Project Board is responsible to the Director for Economy and Place at Herefordshire Council for the monitoring and performance management of the MarRE Project.

2.6.2 The Project Manager reports directly to the Project Board and on a day-to-day basis to the Sustainability and Climate Change Manager at Herefordshire Council, who also Chaired the Project Board.

3. Project Progress

3.1 Project Progress

- 3.1.1 The Project had an expected start date of 1 January 2019, however, due to unforeseen delays in the contracting process, the Project's commencement date was delayed until 1 July 2019.
- 3.1.2 Despite the delayed start and impact of COVID-19, the Project maintained a Practical and Financial completion date of 31 December 2021 (agreed in Project Change Request 1). The delayed start inevitably created extra pressure on Herefordshire Council to launch MarRE as soon as possible and applications were invited in July 2019. At this time, processes for checking eligibility and governance were not finalised. This inevitably created administration difficulties and additional time delays when the Project Manager was appointed in August 2019. The 'soft launch' led to Herefordshire projects coming forward, creating an imbalance of grant funding being awarded and the need for Shropshire and Telford & Wrekin to catch-up over a tighter delivery timescale. COVID-19 inevitably impacted on the delivery of the Project and on organisations themselves. Organisations were unsure of the future and were more reluctant to commit to investing in their premises and, for periods of time, installers were not able to access premises to undertake work.
- 3.1.3 Two Project Change Requests (PCRs) were submitted to MHCLG, these are as follows:
- PCR 1 (from May 2019) – enabled the Practical Completion Date to be extended to 30 September 2021 and the Financial Completion Date to be extended to 31 December 2021. All expenditure and output profiles remained the same and were refiled accordingly.
 - PCR 2 (from September 2020) – enabled the removal of Project Output C32 ('decrease of annual primary energy consumption of public buildings') following the approval of the ERDF Sustainable Energy in Public Buildings Programme, operating across the Marches in the same timescales. PCR 2 extended the Project's Practical Completion Date from September 2021 to December 2021.
- 3.1.4 A Project Inception Visit (PIV) was undertaken in June 2019 and an On-the-Spot Verification Visit (OTSV) in July 2021. The purpose of a PIV is to ensure that applicants understand the requirements of the funding agreement and required systems are in place to meet the monitoring and audit requirements and the OTSV is to verify that the Project is delivering to the terms and conditions set out in its Funding Agreement and Offer Letter and complies with the Regulations as set out in the Council's Regulations (EC) 1303/2013. All actions agreed at the visits were minor and addressed accordingly.

3.2 Project Targets (Spend and Deliverables) up to 31 December 2021

- 3.2.1 The total cost of the Project was £2,291,539, of which ERDF contributed £1,284,064. The total cost of the Project was split between the Transition region of Telford & Wrekin and Shropshire (£1,382,923) and the More Developed region of Herefordshire (£908,616). Table 3 provides details on the funding package and Table 4 provides details on the original Project Deliverables. As outlined in paragraph 3.1.3 Project Output C32 ('decrease of annual primary energy consumption of public buildings') was later removed.

Table 3: Project Budget

	Transition	More Developed	Total
Revenue			
ERDF	£61,755	£34,309	£96,064
Public Funding	£4,566	£10,486	£15,052
Private Funding	£36,602	£23,821	£60,423
Revenue Total	£102,923	£68,616	£171,539
Capital			
ERDF	£768,000	£420,000	£1,188,000
Public Funding	£126,000	£84,000	£210,000
Private Funding	£386,000	£336,000	£722,000
Capital Total	£1,280,000	£840,000	£2,120,000
Total	£1,382,923	£908,616	£2,291,539

Match funding comprised a combination of cash contributions from Project partners (public funding) and private sector contributions towards renewable technology installations (private funding).

Table 4: Project Deliverables

	Transition Shropshire & Telford & Wrekin	More Developed Herefordshire	Total
C30 Additional Capacity for Renewable Energy Production (MW)	1.272	0.848	2.120
C34 Estimated GHG Reductions (CO2e)	306	204	510
C1 Number of Enterprises Receiving Support	22	13	35
C32 Decrease of annual primary energy consumption of public buildings (later removed)	100,800	67,200	168,000

3.3 Project Performance

3.3.1 MarRE is currently on target to meet or exceed all of its financial and deliverable targets. By 30 June 2021, 77.72% of revenue funding and 29.77% of capital funding had been defrayed and 45% of its Renewable Energy Production target, 48% of its GHG reductions target and 51% of enterprises receiving support target had been delivered. By 31 December 2021 the Project forecasts that all revenue and capital funding will be defrayed, and all outputs will be exceeded. Due to the continuation of COVID-19 and its ongoing impact on organisations and suppliers, it may be necessary to extend the completion date for a small number of projects. At the time of writing the Summative Assessment, the Project is on track to complete by 31 December 2021. A PCR, requesting a 3 month extension, will be submitted prior to this date, if projects require more time to complete.

3.3.2 In addition to the Project deliverables the Project set out to achieve objectives within its Full Application these being the development of new renewable energy projects, supporting and educating businesses, local authorities and communities to reduce CO2 emissions and to increase resilience through promotion of energy efficiency measures.

MarRE focused on the development of renewable energy projects during its delivery period. Some promotional work had been undertaken by the Project Manager to raise awareness about the grant scheme, however, due to the lack of resources and skills the Project has not been able to provide an educational role or engage technical experts to help guide the development of individual projects or to compare different technologies. At a Project Steering Group and Board level technical expertise was provided by the Regional Senior Energy Projects Officer however this was to advise on the applications that had been received and was not available to individual applicants at enquiry stage or in developing their projects.

87% of the renewable energy projects that have been approved are solar PV. Although this has achieved excellent outcomes in terms of additional capacity for renewable energy and Greenhouse Gases reductions, it demonstrates that the Project could have been improved with technical expertise to advise applicants about the range of renewable technologies available.

However, it is recognised, that the Project delivered during COVID-19 lockdown, which limited and prohibited access onto premises, making it difficult not only to undertake any independent assessments to advise on the different types of technology available but also to undertake the work. The excellent reaction to the pandemic by the Project Team ensured that organisations were able to access funding and undertake work quickly that would benefit the organisation and enable to the Project to be in a position to achieve its spend and output targets by 31 December 2021.

‘The Covid-19 pandemic did hit the delivery of the scheme as companies put off investment and installation was made difficult due to restrictions, which was reflected in the excellent risk assessments provided by the Project team. The Project Team has worked really hard to ensure that the Project was able to get back on-track to meet its targets’.

Stakeholder

3.4 Project Activity

3.4.1 The Project Logic Model lists the activities to support the delivery of the MarRE Project, developed by Herefordshire Council as part of their ERDF Full Application as follows:

- Invite Expressions of Interest
- Grant applications
- Governance Steering Group and Project Board Meetings
- Install renewables
- Marketing, publicity and case studies

These are explored in more detail below:

3.4.2 Invite Expressions of Interest

The grant scheme was launched on 1 July 2019 and closed 20 June 2021. During this time organisations were able to submit Expressions of Interest (EoIs). The Project Manager received the EoI and undertook an eligibility assessment (assessing eligibility of applicant and quoted technology). If required, the Project Manager provided advice to applicants in order to meet the eligibility threshold. The EoI process took a maximum of 5 working days to complete.

3.4.3 Grant applications

A two-stage application process was developed to try to ensure a quick turn-around in the decision-making process (EoI and Full Application). Following the submission of an eligible EoI, applicants were invited by the Project Manager to submit a Full Application. From submission of the Full Application to contracting stage, the process took 4 – 6 weeks (depending on timing of the Project Board). In total 210 EoIs were received and assessed, of which 108 applicants were invited to submit a Full Application. In total, 77 Full Applications were submitted, and 54 Full Applications were approved.

On reflection, the Project Team and stakeholders felt that a future scheme would benefit from being more flexible, providing different schemes for different organisational sectors, in particular, providing a simpler application process for voluntary and community groups and other third sector organisations. The Project Manager provided evidence of voluntary and community sector organisations interest in the scheme, however the process for accessing the funding led to some organisations deciding not to continue. ERDF rules and regulations provide limited flexibility, and the Project could not be adapted to include a simple application process for this sector. Telford & Wrekin Council recognised that a separate, smaller fund was needed to address climate change and sustainability projects and successfully trialled a streamlined process for this sector, funded by their own resources.

It was noted by the Project Team and Stakeholders that there are a lot of different sustainable energy schemes providing support and funding to a wide variety of groups, all slightly different but often overlapping (for example Worcestershire's Business Energy Efficiency Programme and the Sustainable Energy in Public Buildings project, both operating across the Marches). Again, it was recognised that in future the support on offer needs to be coordinated with, and promoted alongside, other similar projects so that the customer understands the suite of potential local support and where their project fits best.

We promoted the MarRE scheme and were able to support MarRE businesses with free energy assessments allowing them to proceed with MarRE grant application. We would signpost our Marches businesses to the scheme if they were interested in renewables, even though we could have helped them ourselves as they would receive higher % of funding through MarRE, which is in the best interest for the business.

Worcestershire BEEP Team

3.4.4 Governance Steering Group and Project Board Meetings

A Steering Group and Project Board were established following the appointment of the Project Manager in August 2019. The first Steering Group and Project Board meetings were held in October 2019. The majority of meetings were held every six weeks. In total 14 Steering Group and Project Board meetings have been held over the period of the Project.

The MarRE Project Team oversaw the management and administration of the two groups, providing agendas and papers before meetings were held, minutes and a detailed risk register. The MarRE Project Manager chaired the Steering Group and an officer from Herefordshire Council chaired the Project Board.

Overall, Project Steering Group and Board members spoke very highly of the Project Team, commending their personable, organised and efficient approach.

'I have worked on a number of EU-funded projects and have found the papers and associated governance from the MarRE Project Team have been excellent. All of the information required to make a judgement is available. The Project Team are always available to answer other questions as and when required.'

Steering Group and Project Board Member

'The Project Manager did meet with me to go through everything and responded promptly whenever I had a query but I personally like documentation in one place to refer to as and when.'

Steering Group Member

3.4.5 Install renewables

Organisations were not required to seek independent advice before submitting an application, however for microgeneration, with a capacity of up to 50 kWp, applicants were required to purchase the technology from an MCS certified installer and for generation, with a capacity of over 50 kWp, applicants were required to purchase the technology from a suitably certified installer.

The MarRE Team checked accreditation before approving the Project and on completion requested that the applicant produced certification and contractor completion certificates. It was intended that the Project Manager would visit each installation once completed and certify the installations, however due to COVID-19 restrictions, this was not possible. Projects were therefore requested to send photographs of the installation in situ and supply details about their energy savings. Once COVID restrictions had been lifted it was intended that the Project Manager would visit at least a large sample of the completed installations. 87% of renewable technologies approved at Full Application stage were solar PV.

On reflection, Project staff and members of the Project Board recognised that early engagement and provision of independent technical advice (including energy efficiency) could have led to increased energy savings and encouraged more variety in the types of installations coming forward.

'In future funding bids I would seek to understand ways a broader range of renewable technologies could be supported; the intention of the grant scheme was that all renewables are eligible but due to the economics of renewables the scheme has supported almost solely solar PV.'

Board Member

'If we were to re-design the Project from scratch, I may take some of the lessons from sister projects such as BEEP (Business Energy Efficiency Programme) managed by Worcestershire Council. They engaged a range of technical experts to help guide the development of individual projects. This would be particularly useful when comparing very different technologies.'

Steering Group Member

One of the outcomes identified in the Full Application (detailed in 2.2.1) was that the Project would benefit the renewable supply chain in and around the Marches and, in turn, benefit the skills job market. At the time of undertaking the Summative Assessment, the Project Manager was planning to survey local renewable technology installers to assess the impact of the Project and to understand the needs of the sector going forwards.

3.4.6 Marketing, publicity and case studies

The Project Team developed a Communications Plan as part of its Full Application which identifies the following marketing and publicity activities:

- Set up MarRE webpage on LA websites
- Target appropriate events in each LA area
- Develop a series of press releases across The Marches
- Set up #MarRE and tweet through existing appropriate #
- Attend business breakfasts to promote Project across Project area
- Link to Chamber of Commerce
- Link to Federation of Small Businesses
- Link to Marches Business Environment Networks
- Pop up/leaflets for libraries and customer service centres
- Link to Marches LEP and Growth Hub
- Link with renewable installers across the Marches

A wide variety of promotional literature has been developed and used by the Team, including leaflets and case studies (see Appendix 4) and pop-up stands. The Project does not have its own dedicated website, however a MarRE webpage was developed on the Herefordshire Council website and Local Authority, Growth Hubs, Marches LEP and Sustainability West Midlands had entries on their websites that linked to the webpage. The webpage is still available on some sites and provides information about the Project, types of eligible installations, contact details and case studies. During the delivery of the Project, it provided access to an EoI Form.

Regular press releases were undertaken by local authorities and the Marches LEP. Business organisations, such as the Chamber of Commerce, have alerted their members to the Project.

The Project Manager has undertaken powerpoint presentations for webinars (used by Growth Hubs and Local Authorities at events) and a short video for Telford Growth Hub. The Project Manager has presented at a variety of meetings and events including:

- Shropshire - 'Spark Social Conference' and 'Shropshire Summer Funding Summit' in 2019, Green Grants for Growth in 2020
- Telford and Wrekin - Marches EU Project Workshop at the Centre for Manufacturing Technology in Bridgnorth in 2019
- Herefordshire – 'Renewable Energy in Practice' at Caplor Energy, Herefordshire in 2019

In addition, members of the Project Steering Group and Board have been responsible for ensuring that the Project is promoted widely within their organisations.

Growth Hubs have played an important role engaging with businesses, especially in the initial lagging areas in Shropshire and Telford & Wrekin, promoting the Project through their local business communities, e-newsletters and events.

The MarRE Steering Group was responsible for promoting awareness of the MarRE Project within the partner organisations and the Project Board was responsible for providing high level representation and championing the Project. In addition, the three Councils' economic teams and the area Growth Hubs held extensive contact databases and provided capacity to promote the Project. Stakeholders felt, at times, that there was a disconnect between the Project Steering Group and Board and within the organisations themselves, resulting in everyone not always being as proactive as they could have been. The identification of an individual with marketing responsibilities could have enabled greater clarity.

Although not encouraged by the MarRE Team, many renewable energy installers have filled the marketing gap by undertaking their own direct promotion. This presents a risk that potential applicants are directed to a limited range of renewable technology solutions which may not provide best value or greatest benefit.

'We have always promoted the programme to our local Shropshire business community through regular e-newsletters, supported with case studies which MarRE produced once we had some Shropshire examples. Before they were available we used ones from other areas in the Marches.'

Marches Growth Hub Shropshire

'I think it was the right decision to undertake a "soft launch" as soon as possible in Herefordshire. This did lead to an imbalance in where MarRE funding was spent in the first year or so, which may have caused problems if the Project had not been brought back on track in the other 2 council areas.'

Project Steering Group/Board Member

'Good material and literature which was very clear and helpful'.

Marches Growth Hub Shropshire

The marketing and promotional materials produced by the Project Manager and the press releases by each of the Local Authorities and The Marches LEP were well received by stakeholders. However, the delay in promoting the Project in Shropshire and Telford & Wrekin, at the start of the Project, was seen as one of the main reasons for low take up in these areas at that time, noted by one of the stakeholders as being 'very good but all a bit too late'.

3.5 Project Progress Analysis

3.5.1 It is considered that MarRE has performed well against its Project budget, deliverables and the overall impact it has achieved considering the difficult restrictions the MarRE Team and organisations have had to operate within during the COVID-19 pandemic and the limited capacity available within the MarRE Team.

3.5.2 Despite the success of the Project, there are lessons to be learnt around:

- All systems and processes being in place, including the Project Team, Project Steering Group and Board that can hit the ground running and mobilise the Project quickly, together with a management plan for peak periods of enquiries and submissions e.g., this might include making additional personnel available for busy periods and/or the adoption of bidding rounds.

- Provide an educational role as part of promoting the Project, this could include:
 - Provision of technical advisors who can assist potential applicants in understanding the range of technologies and delivery options available to them.
 - A greater range of available case studies and advice provided on a standalone Project website.
 - Locally delivered seminars or drop-in opportunities for interested organisations to attend.This advice could enable applicants to make informed decisions on energy efficient measures and renewable technology solutions to ensure the most appropriate scheme is in place.

- Although 'Communications and Promotion Update' was reported to the Project Steering Group and Board, there was a missed opportunity for stakeholders to feed into a centrally approved and co-ordinated Communications Plan Action Plan, that could have been reviewed, updated and actioned during the delivery of the Project. As mentioned in paragraph 3.4.6, the identification of an individual with marketing responsibilities would have ensured a consistent approach and message was followed, across the three local authority areas, from the outset of the Project.

4. Project Delivery and Management

4.1 Rationale for MarRE

The restructuring of Feed in Tariffs (FiT's) saw non domestic solar PV installations decline 77% from 2016-2017 in the Marches (OFGEM FiT reports). MarRE provided an incentive for organisations in the Marches (including Local Authorities, Statutory and non-statutory public funded organisations/bodies, Higher and Further Education Institutions, Voluntary/Community organisations, Private sector companies, Registered charities and Not for Profit organisations) to install renewable technologies. Technologies supported were expected to be in the range of 4-200kWp (system kilowatt peak) and included wind, solar, aerothermal, geothermal, hydrothermal, hydropower, biomass, landfill gas and sewage treatment plant gas and biomasses.

4.2 Delivery Model and Process

4.2.1 The grant scheme operated under the GBER Aid for Environmental Protection – Investment Aid for the Promotion of Energy from Renewable Resources. Thresholds on installation costs were not stipulated as part of the grant application process and total cost of projects (approved and committed) ranged between £5,085.60 and £161,630.06 with 50% grant funding ranging between £2,542.80 and £80,815.03. The average total cost of an installation was £25,390.63.

A two-stage application process was developed to try to ensure a quick turn-around in the decision-making process (Expression of Interest and Full Application). The Call for Expressions of Interest was open until 20 June 2021.

4.2.2 Potential applicants could access an Expression of Interest on-line, via the MarRE webpage. The webpage provided details about the Project and eligibility criteria, case studies and MarRE Project Manager contact details.

4.2.3 On submission of the Expression of Interest details of the organisation were recorded by the Project Manager and an eligibility check undertaken. The Project Manager contacted the applicant if further eligibility details required clarification, such as procurement procedures, level of kWp to be generated etc. Following the eligibility check, organisations were either forwarded a Full Application Form or advised that their project was not eligible. The process for undertaking an eligibility check took up to 5 working days. During busy periods, additional capacity was provided by dedicated staff members within Herefordshire Council's Sustainability and Climate Change Team. This additional support was not included as part of the Project costs.

4.2.4 On receipt of the Full Application, the Project Manager assessed and scored against capacity of renewable energy production in £/kWp (representing 50% of the score or 5 out of 10 marks) and estimated cost of decrease in greenhouse gas emissions in GHG/annual carbon savings in tonnes CO₂e (representing 40% of the score or 4 out of 10 marks) . The score sheets were then submitted to the MarRE Steering Group who assessed and scored the Project's sustainability, considering what were the additional benefits and how the Project supported the organisation and its staff to be more sustainable (representing 10% of the score or 1 out of 10 mark).

Projects were scored out of ten and required to meet a score of 4 or above to be recommended to the Project Board for approval. During delivery of the Project, the scoring system was reviewed for voluntary and community sector organisations. Since the majority of applications from this sector were from small scale technologies, changes were made to take into account the community impact for applications being submitted. The Steering Group could agree to increase a score to '4' where significant community impact was argued.

- 4.2.5 Following the decision of the Project Board, applicants were notified of the outcome. Projects that were approved received offer letters and related documents within 8 days (including non-working days). Applicants had 30 days to sign the offer letter and then a further 30 days to undertake the work. From submission of the Full Application to award of contract took between 4 – 6 weeks (depending on the timing of the Project Board meetings).
- 4.2.6 On completion of the projects, the Project Manager visited the premises to check that equipment had been installed satisfactorily and to check and collate evidence of spend. However, from March 2020 COVID-19 prevented this from continuing and applicants were then requested to provide details as part of the Project claim. These included:
- Dated invoices.
 - Evidence of defrayal.
 - Photos of installation in situ.
 - Assets register.
 - MCS certificate or equivalent.
 - Adherence to ERDF Branding and Publicity requirements.
- 4.2.7 On satisfactory completion of the renewable technology projects, applicants were awarded grant funding within an average of 7 days (including non-working days).
- 4.3 **Delivery Structures**
- 4.3.1 Herefordshire Council is the Lead Organisation for the Project and Telford & Wrekin Council and Shropshire Council are delivery partners. The MarRE Project Manager is employed by Herefordshire Council to ensure parity of delivery and service in each of the areas. The Post is Full-Time and commenced in August 2019.
- 4.3.2 Up to March 2020 the MarRE Project Team was located in Herefordshire Council Offices. During COVID-19 lockdown all staff worked from home. The Project Team comprised of the MarRE Project Manager (full-time equivalent) and support from Herefordshire Council's Delegated Grants and Programmes Team (who submitted timesheets, with an agreed hourly rate, totalling approximately 0.5 full-time equivalent).
- 4.3.3 The Project Manager led the co-ordination and delivery of the Project across the Marches. At the start of the appointment, in August 2019, the Project Manager focused on ensuring that all the processes and procedures were in place to administer the grants that had already being submitted by organisations in Herefordshire. The systems and processes included the establishment of the Project Steering Group and Board and an appraisal process to ensure ERDF compliancy.
- 4.3.4 In order to manage and monitor the budget and the Project deliverables the Project Manager worked closely with dedicated resource in Herefordshire Council's Delegated Grants and Programmes Team. A Delegated Grants and Programmes Officer within the Team has provided a consistent lead role in the administration of grants for project applications and the preparation and submission of claims to MHCLG. The Officer reports directly to Grants and Combined Programmes Manager.
- 4.3.5 During its delivery the Project Manager reported directly to Herefordshire Council's Sustainability and Climate Change Manager and to the MarRE's Project Board, whose role was to 'Provide overall guidance and direction to the Project, ensuring it remains within specified ERDF programme constraints'.
- 4.3.6 Both the Project Manager and Delegated Grants and Programmes Officer have maintained an excellent relationship, keeping in constant contact via email, phone calls and Teams. Their dedication and commitment to the Project was acknowledged by stakeholders and was evident to the consultant throughout the compilation of the Summative Assessment.

'The Covid-19 pandemic did hit the delivery of the scheme as companies put off investment and installation was made difficult due to restrictions, which was reflected in the excellent risk assessments provided by the Project Team. The Project Team has worked really hard to ensure that the project was able to get back on-track to meet its targets.

The Project Management Team at Herefordshire Council has done a very good job of bringing the project to a successful conclusion.'

Project Steering Group/Board Member

'Really pleased that the scheme, which started as being quite a risk on timescales/delivery, has ended up being the success that it has, but that has been down to the tenacity of the officers involved.'

Project Board Member

'Well done to Adrian and his team for allocating the grant funding within the timescale. Lots of businesses have benefitted from this scheme and BEEP are now able to support/ help any outstanding businesses that were too late, as long as there is sufficient carbon savings.'

Worcestershire BEEP

4.3.7 Feedback from the Project Team noted the following:

- Complexity of managing a Project across a More Developed and Transition Region and between three Local Authorities, having to set up, monitor and report to MHCLG for the two categories of regions and report to the three Local Authorities on the Project's performance in each of their areas.
- It was a steep learning curve at the beginning having to make sure that all the systems and processes were up and running quickly. The Project took a while to find its feet and to engage with organisations in Shropshire and Telford & Wrekin, who were lagging behind after the Project initially focused its promotion in the Herefordshire area.
- The excellent, hands-on, technical support that was provided by the Regional Senior Energy Projects Officer, based in the Marches Midlands Energy Hub, who sat on the Project Steering Group and Board. In hindsight, the Project Manager felt that the Project required a dedicated technical expert that could have provided ongoing support to the Project and educational role for organisations. In addition, this independent advice could have been built into the Project at enquiry stage.
- Time was wasted processing Expressions of Interest that were submitted by consultants who represented organisations. Out of 20 Expressions of Interest submitted by consultants, only 2 led to completed installations.
- Although the Project worked well alongside Worcestershire BEEP, the Project Manager felt that there were missed opportunities to partner better with BEEP.

4.3.8 The only area of concern, noted by both the Shropshire and Telford Growth Hubs, was the lack of communication with businesses, particularly with those businesses that were not successful or did not meet the brief, noting that 'feedback was not received from referrals that were sent across'. However, the Shropshire Growth Hub stated that 'we did have some good businesses that did go through the scheme and benefitted'. Telford Growth Hub noted that 'meetings between Telford Growth Hub and MarRE later on in the Project were really successful, having a spreadsheet that everyone could look at.'

On reflection, regular communication with Growth Hubs could have really assisted the delivery of the Project, particularly promoting the Project to businesses and signposting businesses to other services that could provide alternative support.

4.3.9 Overall the delivery arrangements were regarded as working well by the Project Team and its stakeholders, enabling the Project to allocate all of its ERDF spend within the Project timescales across The Marches, during such difficult and unusual circumstances caused by COVID-19.

4.4 Governance

4.4.1 A Project Steering Group and Board were established following the appointment of the Project Manager in August 2019. The first Steering Group and Project Board meetings were held in October 2019. The majority of meetings were held on a monthly basis. In total 14 Project Steering Group and Board meetings have been held over the period of the Project

4.4.2 The Steering Group provided practical support, formally appraising the pipeline of projects at each meeting and guiding on project suitability. The Steering Group also had a role in risk management and promoting awareness of the Project within the partner organisations.

4.4.3 The Project Board was responsible to the Director for Economy and Place at Herefordshire Council for the monitoring and performance management of the Project. The Project Board considered, and signed-off, grant decisions based upon guidance and recommendations from the Steering Group. The Board provided high-level representation and championed the work of the Project and oversight on risk mitigation.

4.4.4 Feedback from the Project Team and members of the Project Steering Group and Board noted the following:

- The numbers of meetings and the organisational work involved was very time consuming for the Project Team and, in hindsight, the Project Manager considered whether a joint Steering Group and Project Board could have been a more efficient use of time, especially in periods when only a small number of projects were coming forward. One member of the Project Steering Group and Project Board suggested that 'in between monthly Steering Group meetings, a joint meeting could take place perhaps six-monthly or annual meeting of both the Project Steering Group and Board might have proved useful'.
- On reflection, in order to operate efficiently, it is important that Board Members are empowered, by the organisation they represent to make decisions in the room.

'You need a Steering Group and a Project Board – you cannot scrutinise if you already own the answer'

Board Member

'As Project Board partners should be able to speak on their respective authority's behalf and not sure that they have been on occasions – felt that they had to check back, a Project Board should be able to make decisions?'

Board Member

4.4.5 It is evident that the partner organisations, including the three local authorities and the Marches LEP, were represented on the Project Steering Group and Board. Representation provided a good climate change background and technical expertise was provided by the Marches LEP through the Regional Senior Energy Projects Officer at both the Project Steering Group and Board. The groups, however, lacked representation from Officers that had direct access to end beneficiaries (including Marches LEP Growth Hub and voluntary and community organisations). Representation from these officers could have ensured engagement was more focused throughout its delivery, especially at the start of the Project. Also, more senior representation, from some organisations on the Project Board, may have enabled decisions to be made more quickly and encouraged greater engagement/influence at a higher level within their organisations.

4.5 Integration of the Horizontal Principles

4.5.1 The European Structural and Investment Funds programme requires projects to include measures to support the Sustainable Development and Equality and Diversity themes, also referred to as Horizontal Principles.

4.5.2 Herefordshire Council, as the lead organisation delivering MarRE and Shropshire Council and Telford & Wrekin Council, as partner organisations, integrate the environment and equality into their decision-making processes at all levels.

4.5.3 Herefordshire Council's Environmental Policy (2019 - 2022) is committed to:

- Make efficient use of natural resources.
- Minimise the amount of waste going to landfill.
- Reduce carbon emissions from our own activities and those of the wider community.
- Raise awareness of, mitigate, and adapt to wider climate change impacts.
- Prevent pollution and minimise environmental risks.
- Conserve the natural and historic environment of Herefordshire.
- Promote links between environmental sustainability, economic resilience and wellbeing.

4.5.4 In light of the Equality Act 2010, Herefordshire Council's Equality Policy (2020 – 2023) is committed to:

- Promote the principles and benefits of working with an Equality and Human Rights ethos.
- Support communities to be accepting and at ease with each other.
- Support people, communities and organisations to challenge the prejudices that can lead to unlawful discrimination.
- Reject any form of extremism, discrimination, prejudice, harassment, victimisation or violence.
- Work in partnership to be more efficient, effective and consistent in our approach across the county.
- Deliver the best possible standard of service to all our customers.
- Demonstrate a fundamental respect for human rights by helping people to understand the responsibilities that underpin their human rights.
- Support the No Prejudice in HERefordshire campaign.

4.6 Project Delivery and Management Analysis

4.6.1 The MarRE Project has been successful in delivering its primary goal to encourage the installation of renewable energy regeneration technologies after the demise of the FiT scheme. The Team put in place extremely efficient processes and systems, ensuring a very quick turnaround following Project approval and claiming grant funding.

4.6.2 The Project took a while to find its feet, focusing its attention on Herefordshire because of the need to deal with the interest that resulted from the initial promotion. This resulted in Shropshire and Telford & Wrekin lagging behind. Despite this and the impact of COVID-19 and lockdown, the Project Team and stakeholders pursued additional PR in their local areas. As a result, the Project is now forecast to deliver in excess of its original targets. This represents an excellent investment for Herefordshire, Telford & Wrekin and Shropshire local authorities in helping organisations to invest in renewable technologies. However, the lack of technical expertise at beneficiary level was evident, with 87% of the renewable technologies installed or to be installed being solar PV and requiring little technical understanding. Engagement of a range of technical experts to help guide the development of individual projects would be particularly useful in future when comparing very different technologies.

4.6.3 From the results of the beneficiary survey and interviews undertaken with the Project Team, Project Steering Group, Project Board and other stakeholders, it was evident that the process for accessing the funding and the type of support on offer did not always address the needs of the voluntary and community sector, with only 15% of full applications being approved from this sector. In future the voluntary and community sector needs to be represented at all governance levels and consideration for separate criteria and application processes undertaken.

5. Project Outcome and Impact

5.1 Project Expenditure

5.1.1 The Project is forecast to commit all its funding by 31 December 2021. Due to the continuation of COVID and its impact on organisations and suppliers, it may be necessary to extend the completion date for a small number of projects. At the time of writing the Summative Assessment, the Project is on track to complete by 31 December 2021. A PCR, requesting a 3 month extension. will be submitted prior to this date, if projects require more time to complete.

5.2 Project Performance

5.2.1 Table 5 provides an analysis of the Project's performance, in terms of its spend and output indicators, including the original targets, actual performance up to 30 June 2021 and its projected performance by 31 December 2021. Projected performance includes forecasted revenue costs and capital costs associated with projects that are committed and in progress.

5.2.2 The overall assessment provides a green rating for targets that are projected to be met or exceeded by 31 December 2021¹. The assessment is made against the Project's original targets.

Table 5 : Spend and Outputs Performance

Indicator	Targets	Actual Performance at 30 June 2021		Projected Performance at 31 December 2021		Overall Assessment
	Original	No.	% of Target	No.	% of Target	
Revenue Expenditure	£171,539	£133,317	77.72%	£171,539	100	
Capital Expenditure	£2,120,000	£631,212	29.77%	£2,120,000	100	
Total Expenditure	£2,291,539	£764,528.89		£2,291,539		
C30 Additional Capacity for Renewable Energy Production (MW)	2.12	0.954	45%	3.028	143	
C34 Estimated GHG reductions (CO2e)	510	247	48%	678	133	
C1 Number of Enterprises Receiving Support	35	18	51%	41	117	

5.3 Project Impact

5.3.1 Up to 30 June 2021 the Project had achieved approximately 50% of its deliverables, 77% of revenue spend and 30% of its capital spend. To try and commit as much funding as possible, and to give projects enough time to contract and defray expenditure by 31 December 2021, it was agreed at the Project Board meeting on 14 April 2021, to close the Project to new full applications in Herefordshire (as a high volume of Expressions of Interest had been received) and to close the Project for new full applications in Shropshire and Telford & Wrekin on 20 June 2021.

¹In Line with MHCLG's tolerance level for Underperforming Methodology

- 5.3.2 At its meeting on 14 July 2021 the Project Board approved 13 Projects, committing all of the Project expenditure and which will result in all of the Project deliverables being exceeded. These figures have therefore been used to forecast the Project's performance up to 31 December 2021 and, based on the previous track record of projects completing following approval, it is extremely likely that these figures will be met.
- 5.3.3 The Project is on target to achieve all capital and revenue spend by 31 December 2021, providing 3.028 MW Additional Capacity for Renewable Energy Production and enabling 678 CO₂e GHG reductions. The Project is also on track to benefit 54 organisations, including 41 businesses enterprises. It is anticipated that the final figures will far exceed the original Project targets.
- 5.3.4 The continued interest is noted in the Beneficiary Survey (see 5.4.10) and reflects the ongoing need to provide an educational role (for both energy efficiency and renewable technology solutions) and funding towards their costs.
- 5.3.5 The take up of grants was high for businesses (representing 76% of organisations) and low from the voluntary and community sector (representing 15% of organisations). From the consultations undertaken and the beneficiary survey, it is apparent that the funding on offer and the application processes involved may have deterred applications from this sector.
- 5.3.6 In summary, although the Project had a slow start, followed by a time of uncertainty during the COVID-19 and the lockdown period, it quickly got back on track and adapted to the new ways of working. The Project Team, Project Steering Group and Project Board and other Project Stakeholders have dedicated time and resources to enable the Project to succeed, especially towards the end of the Project period when there was a push to promote the Project in order to commit all the funding and allocate all of the Project outputs.
- 5.4 **Project Feedback**
- 5.4.1 To assess additional impact of the overall Project a beneficiary survey was circulated to 41 beneficiaries and received 27 responses (see paragraphs 1.3.7 – 1.3.8). 16 responses were received from SMEs (59.26%) 4 from the voluntary and community sector (14.81%) 4 from the charity/not for profit sector (14.81%) and 3 from local authorities (11.11%).
- 5.4.2 There were various ways in which potential organisations could find out about the support on offer and this is reflected in the survey with the different engagement approaches being distributed as follows:

Table 6: How Organisations Engaged with the Project

Type of Engagement	Number
Social Media	0
Attending an event/roadshow	1
Signposted from other initiatives such as BEEP	2
Phoning/emailing/visiting the Growth Hub	2
Contacting the MarRE Team direct	3
Word of mouth	4
Contacted by an installer/supplier of renewables	5
Looking on the Growth Hub/Council websites	7
Other (Independent agent, LAs, Community Council of Shropshire)	6
Total	30

The MarRE Team did not directly promote the Project; however, marketing materials were produced by the Project Manager (such as a webpage, webinars, case studies, leaflets etc) and included on partner and stakeholder websites and distributed within their business and organisation networks.

- 5.4.3 When asked about how the organisation identified the most appropriate renewable energy technology installation, most respondents cited advice from an installer (11 respondents, 41%) with only 6 respondents (22.2%) undertaking an independent professional advice/audit and 2 respondents (7%) accessing the Worcestershire BEEP programme to undertake an audit. 8 respondents (30%) undertook their own company research. The Project did not provide access to independent advice or stipulate this as a condition of the grant funding. Such advice could have enabled applicants to explore a wider range of solutions and commit to future investment and efficiencies. The high volume of solar PV has provided many benefits (including savings in energy costs to the organisation and reduction of GHG emissions) however the potential to promote other renewable technologies was a missed opportunity.
- 5.4.4 Overall, respondents identified a number of benefits that have resulted from being involved in the Project (Table 7).

Table 7: Benefits that have resulted from being involved in the Project

	Number
Positively impacted upon the environment & climate change	24
Improved energy affordability	23
Enabled the organisation/business to thrive by generating financial savings	19
Avoided wasting energy	16
Enabled the organisation to promote its climate change credentials to the community/customers	14
Safeguarded existing or created new jobs	6
Greater networking with other organisations/businesses that prioritise carbon reductio	1
Pursued new customers/new markets	0
Other ('preserving a heritage asset')	1

- 5.4.5 It is really positive to see the added value and impact the Project is making. Out of the 27 respondents, only 4 said that no additional activity has yet taken place (with 1 respondent saying that 'it will resume when the MarRE funded heating system is up and running') and 24 respondents (85%) already undertaking additional activity to reduce the carbon footprint of their organisation through adopting new practices. These are listed in Table 8 below.

Table 8: Additional activity undertaken to reduce the carbon footprint

	Number
No additional activity has taken place	4
Additional actions to improve energy efficiency/reduce energy costs	20
Encouraging and supporting staff/volunteers to be more sustainable	13
Environmental Policy improvements	8
More efficient waste management	6
Water management improvements	3
Changes to the organisation/business' marketing approach	3
Pursuing active travel planning with staff/volunteers	1
Changes to the business model	0
Other ('Providing a Zero Energy Building as a model to local people & businesses', 'it will resume when the MarRE funded heating system is up and running')	2

- 5.4.6 It was clear that respondents had found the grant funding extremely valuable with 26 respondents saying that they could not have achieved similar results, in the same time frame, without financial support.
- 5.4.7 Overall respondents viewed the support received by the MarRE Team as 'excellent' (21 respondents, 81%) or 'very good' (5 respondents, 19%) with over 70% of respondents accessing advice and support at pre-application, application and project delivery/claiming stages and/or to receive specific compliancy advice (such as procurement). Overall, the respondents attributed this to having access to a Team that always made themselves available and provided valuable support.

'...They were informed and fully understood the problems facing the Project Implementation Team with shortages of materials and contractors to undertake the work required. They were also very patient and supportive as we tried to convince local planners of the importance of our project. Their encouragement helped us to persevere with our project.'

'The team were always available with advice and support to help complete the project objectives.'

'MarRE understood our need to make changes to our initial proposal and helped us through that process.'

'I found the process fairly simple with the support offered by the Team.'

- 5.4.8 In addition, the Team has received direct positive feedback and recognition of their support during the difficult times that COVID-19 placed on many struggling businesses.

'You and your team have been really proactive and helpful from the outset, but I want you to know how much we appreciate your prompt and understanding response. This is an awful situation for us all but you have helped our financial situation enormously.'

- 5.4.9 1 response was received from a community organisation and related to the onerous application process, rather than the MarRE Team itself.

5.4.10 Finally, beneficiaries were asked if there were other areas of renewable energy and carbon reduction activity that they might wish to pursue if additional funding was available. This received a positive response from 19 respondents (70%) identifying a wide range of energy efficiency and renewable technology solutions including:

- *Electric vehicle charging points and battery storage*
- *LEP lighting*
- *Solar PV*
- *Warm air heaters to replace (old) system*
- *Biomass heating system*
- *Air source pumps*
- *Water pumps*
- *Insulation*
- *Water recycling technology*
- *Remote controls to fine tune energy use*

‘Nothing is off the table for us, we absolutely would take advantage of any grants available that will make the planet a better place, for example we are looking at zip doors for heat retention in our warehouse and we are extending our ability to charge electric cars’

5.4.11 In conclusion, despite the difficult circumstances surrounding the delivery of the Project and with such a small Project Team in place, the feedback from beneficiaries is overwhelmingly positive. The Project has successfully provided a balance of support that has helped applicants through the Expression of Interest, Full Application, Contract and Claiming stages and it has created an appetite to introduce more energy efficiency and renewable technology measures in the future.

5.5 Integration of the Horizontal Principles in the Delivery of the Project

5.5.1 Horizontal principles were embedded into the development and delivery of the Project. It was noted that the Project Manager attended events, where beneficiaries were more difficult to reach, such as Parish Groups and social enterprises. Accessible and easy to understand leaflets were produced and case studies, showcasing technologies already installed by different organisations, were provided on the MarRE webpage (Appendix 4).

5.5.2 Some digital communication did take place, particularly during the lockdown period. The Project Manager provided a short video and webinars that were posted on Growth Hub websites and used at events. In future there is an opportunity to reach out to more organisations and beneficiaries by making greater use of digital communications such as providing podcasts, pre-recorded bite size information on the different types of renewable technologies available or to stream more presentations that target different groups of beneficiaries.

5.6 Strategic Added Value

5.6.1 Strategic Added Value captures benefits that have arisen through the Project that are over and above those which are felt by beneficiaries. Feedback from stakeholders agreed that the MarRE Project has succeeded in providing a wider strategic added value.

5.6.2 The Project Team has to be commended on providing an excellent service to its Project Steering Group and Board members throughout the Project’s delivery. The Team’s continuous reporting of the Project’s performance and approach to risk assessment and mitigation has enabled the Project Steering Group and Board to react quickly when required e.g., in assessing the impact of Covid-19 lockdown and agreeing a course of action.

‘The Covid-19 pandemic did hit the delivery of the scheme as companies put off investment and installation was made difficult due to restrictions, which was reflected in the excellent risk assessments provided by the project team. The project team has worked really hard to ensure that the project was able to get back on-track to meet its targets. The project management team at Herefordshire Council has done a very good job of bringing the project to a successful conclusion’.

Steering Group and Project Board Member

- 5.6.3 From the outset, The Project Team recognised the value of working closely with other energy projects, such as the ERDF Worcestershire BEEP and the Sustainable Energy in Public Buildings projects. The Project worked increasingly closely with BEEP, helping with enquiries, sharing best practice, leads, marketing and supporting events together.

‘We promoted the MarRE scheme and were able to support MarRE businesses with free energy assessments allowing them to proceed with MarRE grant application. We would signpost our Marches businesses to the scheme if they were interested in renewables, even though we could have helped them ourselves as they would receive higher % of funding through MarRE, which is in the best interest for the business.’

Worcestershire BEEP Team

5.7 Legacy and Future Work

- 5.7.1 The success of the MarRE Project, particularly its delivery during the COVID-19 pandemic over such a large geographical area, provides a good legacy of how to bring a Project to a successful conclusion when faced with circumstances that are extreme and unforeseen. This is demonstrated through the flexible and adaptable nature of the Project Team, thorough risk mitigation being in place, general momentum that has been built and collective working established through the Project Steering Group and Board.
- 5.7.2 The Project has been successful in raising awareness of other types of renewable energy and energy efficiency solutions among local organisations. This has encouraged an appetite for further local investment to assist in carbon reduction, to improve sustainability and to make savings on energy costs. Any project going forward would need to invest in independent technical expertise in order to ensure a full range of investment options has been considered by potential beneficiary organisations.

6. Project Value for Money

6.1 Expenditure

- 6.1.1 The original Project totalled £2,291,539 of which ERDF contributed £1,284,064 (56% of funds). The total costs of the Project were split between £2,120,000 capital funding and £171,539 revenue funding.
- 6.1.2 By 30 June 2021, the Project defrayed £764,528.89 of the total Project costs (33.4%) split between £631,212 (29.77%) capital funding and £133,317 (29.77%) revenue funding. Following the commitment of all capital funding in July 2021 the Project is on track to allocate all of its capital and revenue budget by 31 December 2021.

6.2 Value for Money Analysis

- 6.2.1 Data on monetary savings made by the MarRE beneficiaries was not available at the time of the evaluation, however all beneficiaries, as part of their contract, must submit a progress report 6 months after completion (or as advised by Herefordshire Council). It is understood that the MarRE Team will be requesting reports from all applicants, including data on monetary savings, by November 2021. From information provided on Full Application Forms, the MarRE Project will result in 3.028MW additional capacity for renewable energy production and 678 CO₂e saved.

'The MarRE Project provided renewable energy solutions to businesses and organisations who would never have invested. The process could be laborious at times for our applicants, however they always seem happy with the result'

The MarRE Project Team

- 6.2.3 It is evident from the beneficiary survey that the reductions in energy use and costs have helped to improve the bottom line of the beneficiaries and brought about some unintended outcomes, which are not possible to quantify in monetary terms.

'There were a lot of hidden outcomes, businesses are now able to show clients their solar panels and have good environmental credentials. It's a great tick box when tendering for work'

The MarRE Project Team

- 6.2.4 Table 9 provides an analysis of value for money using the original output targets as a benchmark. The benchmark divides the original Project value (£2,291,539) by the original output target. The final cost per output divides the projected final Project value (£2,291,539) by the 31 December 2021 projected output.

Table 9 – Value for Money

	Original Output Targets	Benchmark cost per output	Projected Performance at 31 December 2021	Final cost per output
C30 Additional Capacity for Renewable Energy Production (MW)	2.12MW 2,120 kWp	£1,081 (per kWp)	3.028MW 3028 kWp	£757
C34 Estimated GHG reductions (CO₂e)	510	£4,493	678	£3,380
C1 Number of Enterprises Receiving Support	35	£65,473	41	£55,891

- 6.2.5 Due to budgetary limitations, it has not been possible to identify similar schemes operating across England and benchmark interventions.
- 6.2.6 The analysis demonstrates the Project is forecast to achieve excellent value-for-money, delivering all output targets at significantly lower costs compared to the original benchmark cost².

²*In Line with MHCLG's tolerance level for Underperforming Methodology*

7. Conclusions and Lessons Learned

7.1 Introduction

7.1.1 This final section of the report highlights conclusions of the Project's strengths and weaknesses and makes recommendations for the future, based on lessons learned.

7.2 Conclusions on Project Strengths

7.2.1 Overall there is evidence to suggest that there was a strong rationale for the Project, filling the gap left by the restructure of the FITs regime by continuing to offer financial support for renewable technologies across The Marches at a time when the installation of renewables was not feasible as a business investment without financial support.

7.2.2 The Project Team has delivered a successful Project, providing separate reporting systems and processes for the Transition and More Developed regions, with only 1 full-time member of staff and support provided by Herefordshire Council's Delegated Grants and Programmes Team. In addition to this support, dedicated staff members within Herefordshire Council's Sustainability and Climate Change Team, have provided additional capacity during busy periods, however their time was not included as part of the Project costs.

The Team has facilitated a quick turnaround at each stage of the application process, including payment to applicants, and has been commended by its Steering Group and Board members for having a personable, organised and efficient approach. In reflecting upon factors which contributed to the success of their projects, Project beneficiaries have also made specific reference to having access to a Project Team that always made themselves available and provided valuable support (paragraph 5.4.7).

The Team should also be commended for the Project's high-performance levels; with the MarRE being on track to commit all of its expenditure and exceed all of the Project's outputs by 31 December 2021.

7.2.3 The delivery of the Project during COVID-19 lockdown presented unanticipated challenges. The Project Team had to adapt quickly and deliver the Project remotely. In addition to this there were external challenges with contractors having restricted access into buildings to undertake work and a lot of beneficiaries being more reluctant to invest. The Project governance model embedded a strong risk management approach which enabled a speedy response in flexing Project marketing and delivery arrangements to ensure the delivery timetable was not adversely affected. The Team, Project Steering Group and Board are to be commended on their management of the associated risks to the Project.

7.2.4 Although the renewables technology installations have been mainly focused on solar PV, the Project has uncovered and encouraged the appetite for low carbon energy solutions across a range of organisations in the Marches. In this respect, the MarRE Project has provided a good pilot project that could help to shape future initiatives.

7.2.5 The Project has confirmed, at a grass roots level, that the National Climate Change Policy agenda and Marches SEP's economic vision and objectives speak directly to local organisational strengths and ambitions. There are real opportunities for organisations to form partnerships and work together to act upon area strengths and the 'significant potential for renewable generation including biomass, solar, wind and anaerobic digestion,' highlighted in the objectives of the Marches SEP.

7.3 Conclusions on Project Weaknesses

7.3.1 Although the Project Team was able to deliver a very successful Project, it was recognised that some of the original objectives, particularly around educating organisations, were restricted due to limited capacity within the Team.

7.3.2 87% of the renewable technology solutions supported by the Project were solar PV, and it may be questionable whether best technological solutions were always arrived at. Solar PV is widely understood by

the public and independent advice on all renewable technology and environmental efficiency solutions was not always evident. Given greater resource, this independent advice could have been built into the Project at enquiry stage and all communication with the technical expert undertaken directly with potential applicants, leading to more informed Expressions of Interest being submitted directly by the beneficiaries (and not consultants, as was sometimes the case). Such resource could have enabled greater GHG impact, better value for money and more efficient use of the Project Team's time.

7.3.3 Not all of the application processes were in place from the outset, resulting in early applications relating to one geographical area (and the need to catch up in other areas) and some administration difficulties. Ultimately, the Team and stakeholders were able to redress this problem but early action to put project management infrastructure in place could have prevented the issue from arising.

7.3.4 Although marketing & PR work was reported to the Project Steering Group and Board, communications would have been better served by having a named individual who took ownership/responsibility for this important area of work. Partners were provided with communication tools; however, the Project was not marketed consistently throughout its delivery, and this reduced central control over the Project messages, resulting in:

- A communications gap that others filled with their own message; for example, installers recommended solutions alongside their own product/service which may not always have provided the best technical solution.
- Missed opportunities to educate organisations.

7.3.5 Some of the stakeholders, consulted during this evaluation, identified the Project Steering Group and Board representation as a potential area of governance improvement. It was considered that representation from those who directly interacted with potential beneficiaries might have brought additional knowledge that could have helped inform decisions on various areas of Project delivery. Also, more senior representation, from some organisations on the Project Board, may have enabled decisions to be made more quickly and encouraged greater engagement/influence at a higher level within their organisations.

7.4 Recommendations

7.4.1 Recommendations are provided below on how to improve and expand delivery of similar activities that could be supported in pursuing the government's National Climate Change Policy Agenda and Marches SEP strategic vision and objectives:

7.4.2 **Recommendation 1: Continuity in partnership working to create evidence base of future need and demand of organisations.**

The Project uncovered evidence of future need and demand which requires consideration of a suite of solutions, proportionate to the size and type of organisations and the opportunity to undertake partnership projects. Consideration should reflect upon funding mechanisms, including both grant and loan analysis and investment options.

7.4.3 **Recommendation 2: Clear governance structures and processes in place providing clarity on accountability and assurance from the outset.**

On commencement of a Project all systems and processes need to be in place, with clear and correct paperwork, to ensure full visibility of the Project, give clarity on Project eligibility, systems and processes whilst ensuring equity to all potential beneficiaries.

7.4.4 Recommendation 3: Central co-ordination of all marketing and communications to reinforce Project visibility.

- Assigning responsibility for PR and Marketing to an individual ensures messaging is centrally controlled and maintains the required focus throughout delivery.
- In future, communications could be further strengthened and support the educational objective by providing a standalone website. A standalone website would provide greater value for money in the face of a larger-scale Project, offering a hand-holding tool that leads organisations through the range of low carbon energy support available.
- Providing a clearly defined Project offer and ensuring messages are co-ordinated with other projects delivering carbon reduction targets in the Marches.

7.4.5 Recommendation 4: A future Project Team has capacity to deliver, with clearly defined roles and responsibilities across the Team.

Capacity should provide an educational role and a marketing & communications role (referred to under Recommendation 3 above). The Team should reflect what the lead organisation is trying to deliver and have capacity to articulate messages and provide independent technical advice to potential beneficiaries.

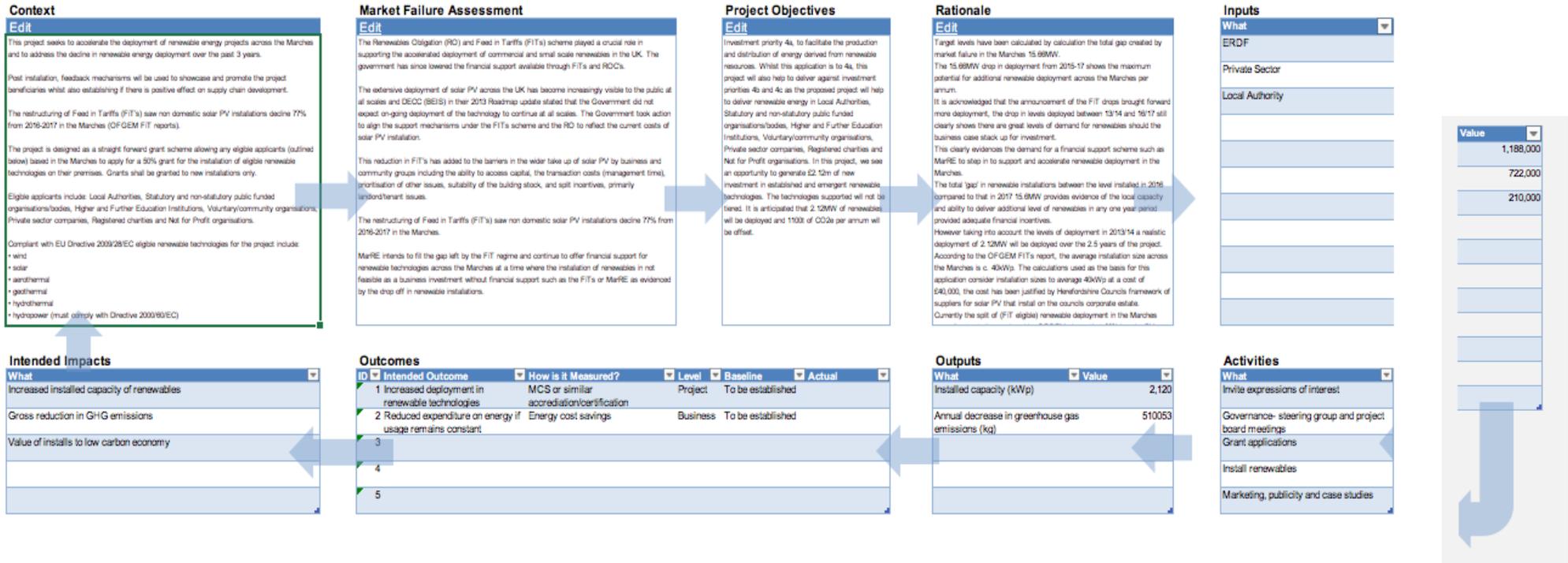
7.4.6 Recommendation 5: Representation on Project Steering Group and Board provides technical expertise , knowledge of the potential beneficiaries and the ability to influence, engage and make decisions.

At a Project Steering Group level representation needs to include technical expertise as well as knowledge and direct access to potential beneficiaries, whilst at a Board level representation should be able to influence and engage within its own organisation and have the ability to make decisions. Appropriate representation on the different groups will ensure the support on offer reflects what is needed, there is direct access to potential beneficiaries and strategic and timely decisions can be made.

7.4.7 Recommendation 6: Future Projects match interventions to the Marches SEP's identified objectives, encouraging partnering and networking arrangements and building communities of learning and economic growth.

By working together, using locally identified assets and expertise, beneficiary organisations will meet local/national priorities and address the Marches targets identified in the LEP Energy Strategy and SEP.

Appendix 1: MarRE Project Logic Model



Appendix 2: MarRE Consultees

Name	Role	Organisation
MarRE Team		
Adrian Marshall	Marches Renewable Energy Project Manager	Herefordshire Council
Paula Daniels-Symonds	Delegated Grants and Programmes Officer	Herefordshire Council
Project Steering Group		
Tim Yair	Regional Senior Energy Projects Officer – Based in the Marches Midlands Energy Hub	The Marches LEP
Belinda Wilson	Environmental Management Officer	Herefordshire Council
Janet Lamb	Property Business partner	Shropshire Council
Webb, Clare (until recently)	Climate Change & Sustainability Project Support Officer	Telford & Wrekin Council
Jane Mackie-Wilkes (new representative)	Climate Change & Sustainability Project Support Officer	Telford & Wrekin Council
Project Board		
Richard Vaughan (Chair)	Sustainability & Climate Change Manager	Herefordshire Council
Tracy Ricketts	Grants & Combined Programmes Manager	Herefordshire Council
Tim Yair	Regional Senior Energy Projects Officer – Based in the Marches Midlands Energy Hub	The Marches LEP
Matt Potts	Business Growth and Inward Investment Manager	Shropshire Council
Adrian Cooper	Planning Policy and Strategy Manager	Shropshire Council
Harjot Rayet	Senior Planning Policy Officer	Telford & Wrekin Council
Other stakeholders		
Zoe Hibberd	Senior Project Officer Business Energy & Efficiency Programme	Worcestershire County Council
Chris Atkinson	Clean Business Growth Manager	Worcestershire County Council
Critchell, Claire	Growth Hub Manager (Telford & Wrekin)	Telford & Wrekin Council
Emma Chapman	Business Growth Manager (Shropshire)	Shropshire Council
Gareth Williams	Managing Director	Caplor Energy

Appendix 3: MarRE Survey Results

Marches Renewable Energy Scheme Funded by the
European Regional Development Fund (ERDF)
Survey Results
15 July 2021

- Answered: 27
- Skipped: 0

(65.8% return rate)

1. Please indicate the type of organisation you are from

ANSWER CHOICES	RESPONSES
Private sector - Small to Medium Size Business	59.26% 16
Voluntary/Community Sector Organisation	14.81% 4
Charity/Not for Profit Company	14.81% 4
Local Authority	11.11% 3
Further/Higher Education Institution	0.00% 0
TOTAL	27

2. How did you find out about the support available through the Marches Renewable Energy Grant Scheme (MarRE)? Please tick all that apply

ANSWER CHOICES	RESPONSES
Attending an event/roadshow	3.70% 1
Phoning/emailing/visiting the Growth Hub	7.41% 2
By looking on the Growth Hub/Council websites	25.93% 7
Contacting the MarRE Team direct	11.11% 3
Seeing an article in the local press	3.70% 1
Social Media	0.00% 0
Word of mouth	14.81% 4
Signposted from other initiatives, such as BEEP	7.41% 2
Contacted by an installer/supplier of renewables	18.52% 5
Other, please specify	Responses 22.22% 6
Total Respondents: 27	

Other:

- Parish Council grant listing
- Herefordshire Council
- Independent agent
- Local authority communication
- Herefordshire Council email
- Community Council of Shropshire

3. In developing your application, how did you identify the most appropriate renewable energy technology installation for your business purposes?

ANSWER CHOICES	RESPONSES
Independent professional advice/audit	22.22% 6
Audit undertaken by 'BEEP'	7.41% 2
Own company research	29.63% 8
Advice from an installer/supplier of renewables	40.74% 11
Other, please specify	Responses 0.00% 0
TOTAL	27

4. Has your participation in MarRE led you to benefit from any of the following? Please tick the top five benefits to your organisation/business.

ANSWER CHOICES	RESPONSES
Avoided wasting energy	59.26% 16
Improved energy affordability	85.19% 23
Positively impacted upon the environment & climate change	88.89% 24
Enabled the organisation/business to thrive by generating financial savings	70.37% 19
Helped to become more competitive and more productive through energy saving	29.63% 8
Pursued new customers/new markets	0.00% 0
Enabled the organisation to promote its climate change credentials to the community/customers	51.85% 14
Greater networking with other organisations/businesses that prioritise carbon reduction	3.70% 1
Safeguarded existing or created new jobs	22.22% 6
Other, please specify	Responses 3.70% 1
Total Respondents: 27	

Other

- Preserving a 'Heritage Asset'

5. How has your participation in MarRE encouraged you to undertake additional activity to reduce the carbon footprint of your organisation/business through adopting new practices? Please tick all that apply.

ANSWER CHOICES	RESPONSES
▼ No additional activity has taken place	14.81% 4
▼ Encouraging and supporting staff/volunteers to be more sustainable	48.15% 13
▼ Pursuing active travel planning with staff/volunteers	3.70% 1
▼ Additional actions to improve energy efficiency/reduce energy costs	74.07% 20
▼ Water management improvements	11.11% 3
▼ More efficient waste management	22.22% 6
▼ Environmental Policy improvements	29.63% 8
▼ Changes to the organisation/business' marketing approach	11.11% 3
▼ Changes to the business model	0.00% 0
▼ Other, please specify Responses	7.41% 2
Total Respondents: 27	

Other

- Activity will resume when the new MarRE funded heating system is up and running
- Providing a Zero Energy Building as a model to local people & businesses

6. In terms of the project you delivered using the MarRE grant, do you think you would have achieved similar results, in the same time frame, without the financial support?

ANSWER CHOICES	RESPONSES
▼ Yes	3.70% 1
▼ No	96.30% 26
TOTAL	27

7. What type of support did the MarRE Team provide prior to and during the MarRE application and delivery process? Please tick all that apply.

ANSWER CHOICES	RESPONSES
▼ Pre-application advice on information required for submission of the Expression of Interest and/or Full Application form/s	74.07% 20
▼ Advice on completing the Expression of Interest and/or Full Application form/s	70.37% 19
▼ Information on the application process including procurement rules	70.37% 19
▼ Advice on project delivery queries e.g. claim form completion, claim-related evidence to be submitted	70.37% 19
▼ Advice was not required	7.41% 2
▼ Other, please specify Responses	0.00% 0
Total Respondents: 27	

8. Please rate the support you received from the MarRE Team.

ANSWER CHOICES	RESPONSES
1 = I felt the support was poor	0.00% 0
2 = I felt the support was adequate	0.00% 0
3 = I felt the support was good	19.23% 5
4 = I felt the support was excellent	80.77% 21
Please provide any further comments on any related issues you would like to highlight	Responses 23.08% 6
Total Respondents: 26	

Other

- MarRE understood our need to make changes to our initial proposal and helped us through that process.
- I found the process fairly simple with the support offered by the team.
- The application process was very onerous for a small community organisation with no paid staff
- Felt a personal contact with MarRE individuals
- The MarRE team were extremely supportive in helping us to produce a Zero Energy Building solution to our 'Heating Project'. They were well informed and fully understood the problems facing the Project Implementation Team with shortages of materials and contractors to undertake the work required. They were also very patient and supportive as we tried to convince local planners of the importance of our project. Their encouragement helped us to persevere without project.
- The team were always available with advice and support to help complete the project objectives.

9. Are there other areas of renewable energy and carbon reduction activity that your organisation/business might wish to pursue if additional funding was available or any specific feedback and suggestions that could help us serve others in future?

ANSWER CHOICES	RESPONSES
No	29.63% 8
Yes, please explain further	Responses 70.37% 19
TOTAL	27

Yes responses:

- Community EV charger at the village hall
- battery storage, electric vehicle charging points
- 1. Replacing lights with LED lighting across the school 2. Solar power
- Solar panels is the next energy saving initiative we are looking to implement
- Solar energy for other buildings on site and at site of related company. Warm air heaters to replace existing (old) system.
- Heat source pumps, energy efficient water pumps
- Nothing is off the table for us, we absolutely would take advantage of any grants available that will make the planet a better place, for example we are looking at zip doors for heat retention in our warehouse and we are looking to extend our ability to charge electric cars.
- Air source Heat pumps
- We want to replace our oil fueled boiler with an air source pump
- Solar panels
- LED Lighting, Insulation for commercial buildings

- We feel that our heating system at the company is a night storage system which is well past its sell by date, we hope to change this to a more efficient system in the near future
- ASHP
- We would like support to heat our planned new offices using heat pumps
- Installation of a heat pump
- Help with water recycling technology. Financial Assistance to enable the organization to replace all light fitting to accept LED bulbs. Support to enable the organization to use remote (internet) controls to fine tune energy use (which would extend the capability of that already planned). Organize courses for local Planners (Shropshire) to enable them to more fully understand the need for Zero Energy Buildings to help us meet Carbon reduction targets and the implications of addressing a Climate Emergency.
- Further solar energy. Rain harvesting. Air source heat pumps for new areas being upgraded
- Biomass heating systems are something we are interested in during the coming months.
- Electric vehicles and charging points

10. Data Information Statement. The information that you provide in this survey will be available to the MarRE Team and, as aggregated information, to the MarRE Steering Group and Board and the Ministry of Housing, Communities and Local Government (MHCLG).

ANSWER CHOICES	RESPONSES
Okay	100.00% 27
TOTAL	27

Appendix 4
MarRE Leaflet and Example of Case Studies

The leaflet features a blue background with a repeating pattern of renewable energy terms. At the top left is the 'Marches Renewable Energy' logo, and at the top right is the 'EUROPEAN UNION' logo. The main title 'MarRE - Marches Renewable Energy Project' is prominently displayed. Below the title, contact information is provided: 'Grants towards renewable energy projects in Herefordshire, Shropshire and Telford & Wrekin' and 'www.herefordshire.gov.uk/MarRE', 'Email: EEM@herefordshire.gov.uk or call 01432 260064'. An illustration shows four people interacting with various renewable energy symbols: a sun, a wind turbine, a water drop, and solar panels. At the bottom, logos for 'Telford & Wrekin COUNCIL', 'Shropshire Council', 'Herefordshire Council', and 'The Marches Local Enterprise Partnership' are shown. Social media icons for Facebook, Twitter, and Instagram are also present, along with the website 'herefordshire.gov.uk'.

Qualifying renewable technologies include:

- Wind
- Solar
- Aerothermal - including air source heat pumps
- Geothermal – including ground source heat pumps
- Hydrothermal
- Hydropower
- Biomass
- Landfill gas
- Sewage treatment plant gas and biogases

Eligible applicants include:

- ✓ Local authorities
- ✓ Statutory and non-statutory public funded organisations/bodies
- ✓ Higher and Further Education Institutions
- ✓ Voluntary/community organisations
- ✓ Private sector companies
- ✓ Registered charities and Not for Profit organisations
- ✗ Domestic households and premises are **NOT** eligible

Find out more at
www.herefordshire.gov.uk/MarRE
Email: EEM@herefordshire.gov.uk or call 01432 260064



MarRE - Marches Renewable Energy Project is a partnership between Herefordshire Council, Shropshire County Council and Telford & Wrekin Council. The project has £1,294,064 of funding from the European Regional Development Fund as part of the European Structural and Investment Funds Growth Programme 2014 - 2020.



European Union
European Regional
Development Fund

Edmo Ltd: Solar PV



Key facts

Location: Ross-on-Wye, Herefordshire UK

Grant recipient: Edmo Ltd, specialists in aluminium extrusion, fabrication and finishing across a huge variety of market sectors – from aerospace engineering to accessibility aids.

www.edmolimited.co.uk

Building: Large extrusion/fabrication factory and head office.

Solar PV: Solar panel electricity systems, also known as photovoltaics (PV), convert the sun's energy to generate electricity. These cells don't need direct sunlight to work – they can still generate some electricity on a cloudy day.

Renewable energy installation: Solar PV

Additional capacity: 130 kWp roof mounted system
kWp is the peak power of a PV system or panel. The power is calculated under a standardised test for panels across all manufacturers to ensure that the values listed are capable of comparison.

Predicted energy generation: 120,602 kWh
A kilowatt hour (kWh) is the energy consumed by a 1,000-watt or 1-kilowatt electrical appliance operating for 1 hour.

CO₂ saving per year: 33.44 tonnes
Based on an emission conversion factor of 0.2773 of a kilogram of carbon dioxide per kilowatt hour.

Financials

System Cost: £81,040

Funding: 50% Marches Renewable Energy grant;
50% Edmo Ltd own funds

Predicted payback time from energy cost saving:
6.8 years, reduced to 3.4 years with the grant

For further information

Marches Renewable Energy (MarRE) is an ERDF funded grant scheme towards renewable energy projects in Herefordshire, Shropshire and Telford and Wrekin.

Adrian Marshall, MarRE Project Manager
email: adrian.marshall@herefordshire.gov.uk
Tel: 01432 260064

www.herefordshire.gov.uk/MarRE

v1_05/2020



European Union
European Regional
Development Fund

Longmynd Travel: Solar PV



Key facts

Location: The Coach Depot, Lea Cross, Shrewsbury SY5 8HX

Grant recipient: Longmynd Travel Ltd is a family owned and run business which was first established in 1973. It has expanded over the years and now operates across the country providing a variety of coach services from large facilities at Lea Cross just outside Pontesbury on the edge of the Shropshire Hills. They are very proud to provide the away team coaches for Shrewsbury Town Football Club, AFC Telford Town Football Club and TNS Football Club.
www.longmyndtravel.co.uk

Building: Coach garage

Solar PV: Solar panel electricity systems, also known as photovoltaics (PV), convert the sun's energy to generate electricity. These cells don't need direct sunlight to work – they can still generate some electricity on a cloudy day.



Renewable energy installation: Solar PV

Additional capacity: 14 kWp roof mounted system
kWp is the peak power of a PV system or panel. The power is calculated under a standardised test for panels across all manufacturers to ensure that the values listed are capable of comparison.

Predicted energy generation: 11,351kWh
A kilowatt hour (kWh) is the energy consumed by a 1,000-watt or 1-kilowatt electrical appliance operating for 1 hour.

CO₂ saving per year: 3.15 tonnes
Based on an emission conversion factor of 0.2773 of a kilogram of carbon dioxide per kilowatt hour.

Financials

System Cost: £9,852.36

Funding: 50% Marches Renewable Energy grant;
50% Longmynd Travel Ltd own funds

Predicted payback time from energy cost saving:
8 years, reduced to 4 years with the grant

For further information

Marches Renewable Energy (MarRE) is an ERDF funded grant scheme towards renewable energy projects in Herefordshire, Shropshire and Telford and Wrekin.

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European Union
European Regional
Development Fund

Queenswood Country Park: Air Source Heat Pump



Key facts

Location: Queenswood Country Park, Dinmore Hill, Leominster, Herefordshire UK

Grant recipient: Queenswood and Bodenham Lake - a partnership between the Herefordshire Wildlife Trust and New Leaf Sustainable Development who manage the country park and nature reserve with the aim of promoting conservation and sustainability.

Building: Jubilee Building - installation of air source heat pump system to replace a Liquid Petroleum Gas (LPG) boiler.

Air source heat pump (ASHP): A system that transfers heat from outside to inside a building, or vice versa. Under the principles of vapor compression refrigeration, an ASHP uses a refrigerant system involving a compressor and a condenser to absorb heat at one place and release it at another.



Renewable energy installation: Air source heat pump

Additional capacity: 12 kWp
kWp is the peak power of a system

Predicted energy generation: 37,428 kWh

A kilowatt hour (kWh) is the energy consumed by a 1,000-watt or 1-kilowatt electrical appliance operating for 1 hour.

CO₂ saving per year: 3.68 tonnes

Financials

System Cost: £7,347

Funding: 50% Marches Renewable Energy grant;
50% Queenswood and Bodenham Lake partnership own funds

For further information

Marches Renewable Energy (MarRE) is an ERDF funded grant scheme towards renewable energy projects in Herefordshire, Shropshire and Telford and Wrekin.

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