

Joint Inception Review: Energy Savings Insurance Program in the LAC Region

Mexico City
March 1st & 2nd 2017



Joint Inception Review of the Energy Savings Insurance Program in the Latin America and the Caribbean Region

WORKSHOP AGENDA

March 1 to 3, 2017
Camino Real – Anzures, CDMX, Mexico

Day 1 - Wednesday, March 1 - Mexico Workshop

9:00 am | Participants Registration and Reception (Meet and Greet)

9:15 am | Opening remarks

- Verónica Zavala, IDB
- Santiago Crehueras, SENER
- Hans Jakob Eriksen, Ministry of Energy of Denmark

9:45 am | Session 1: Status of implementation of the ESI Regional Program

This session will present the current status of implementation of the ESI Regional Program, including description of sectors, beneficiaries and countries benefiting from the Program, the overall approach and methodologies being developed, partnerships established locally, regionally and globally and the knowledge development plan.

Moderator: Maria Netto, IDB

Presentations:

- **Current status of implementation of the regional ESI Program – Esteban Suárez, IDB (30 min)**, will provide a detailed overview of the status of implementation including how funds are being utilized, expected milestones, specific status of countries, beneficiaries, sectors covered by the Program, partnerships built and planned and development of a knowledge sharing program, it will also detail events, publications and online tools - web platform.
- **Approaches and methodologies being developed by the Program and lessons learned – Daniel Magallon, BASE (30 min)**, will provide an overview of the methodological approach designed under the Program, outlining the key features of the toolkit, and developments in improving the methodologies and instruments through experiences in different countries – i.e. Improvements in contract (El Salvador), expansion of technologies covered in methodologies and their upgrades (i.e. solar, stoves, ornamental rocks, etc.), adaptation of the insurance scheme by countries ('fianza' versus 'insurance').

Questions and answers session

11:30 am | Coffee Break

11:45 am | Session 2: The ESI Program in Mexico and the context of energy efficiency in the country

This session will explore the energy efficiency context in Mexico and the role of initiatives like ESI in the enforcement of public policies that foster energy efficiency culture, improve productivity and enhance competitiveness.

Moderator: Enrique Nieto, IDB

Presentations:

- **Energy Efficiency perspective in Mexico, public policies – Santiago Creuheras, SENER (20 min)**, this presentation will outline Mexican targets regarding energy efficiency and how SENER envisages to scale up the ESI approach to support its national policy goals.
- **Initiatives that promote the energy transition in Mexico – Odón de Buen, CONUEE (20 min)**, this presentation will outline Mexican initiatives to promote standards and good energy efficiency practices and how ESI can be aligned with ongoing initiatives from Mexico in this regard.
- **Status of the ESI implementation strategy in Mexico and alignment with local policies and regulations – Adalberto Padilla (20 min)**, building on presentations of the previous section, this presentation will provide an overview of milestones of the Program in Mexico, specific milestones achieved, planned activities so far, initial results, lessons learned and potential to expansion as well as specific local partnerships created, including those with technology providers, local insurers, and local Financial intermediaries.

Questions and answers session

1:30 pm | Lunch Break

2:30 Pm | Session 3: Experiences in implementing the ESI Program in Mexico

This session will provide an overview of activities already under implementation by the rural development bank of Mexico (FIRA) and how this experience and lessons learned are being applied to expand the Program with other beneficiaries and sectors, in particular with Bancomext.

Moderator: Adalberto Padilla, IDB

Presentations:

- **The role of FIRA in agroindustry sustainability – Ernesto Fernández, FIRA (15 min)**, this presentation will provide an overview of FIRA's sustainability strategy, the role that ESI plays in its activities and experiences from other similar initiatives.
- **Energy Efficiency Program in FIRA, the ESI implementation – Mario Monarrez, FIRA (15 min)**, this presentation will provide an overview of the implementation of the ESI Program by FIRA so far, including details regarding the design premises to adapt it to its energy related programs and credit lines, tools developed and available (contract, insurance mechanism, etc.), status of certification of validators and projects, existing and expected pipeline, among others.
- **Promotion strategy and execution of ESI – Erick Rodríguez, FIRA (15 min)**, this presentation will provide an overview of the execution plan for 2017 including regional promotion, media strategy, consultants support and pipeline management. It will also explain the implementation of the MRV automation and workflow system.
- **ESI in the tourism sector, perspective and EE potential – Ivette Valenzuela, Bancomext (15 min)**, this presentation will provide an overview of Bancomext's sustainability strategy and the perspective and potential of the ESI Program in the hotels sector in which the institution is the main financial entity in the country.
- **Planned activities and structure of market assessment to replicate ESI in the tourism sector – Víctor Manuel de la Cruz (15 min)**, this presentation will provide an overview of first findings, guidelines and next steps after obtaining the insights on which the ESI Program development will be based.

Questions and answers session

4:30 pm | Coffee Break

4:45 pm | Session 4: ESI tools developed in Mexico

This session will provide a detailed explanation of the different tools and approaches being developed and implemented by the ESI Program in Mexico.

Moderator: Esteban Suárez, IDB

Presentations:

- **The ESI Standard Contract in Mexico, Aldo Ocampo (Adalberto Padilla en su representación), BOSC (15 min)**, this presentation will explain the Standard Contract adapted to the local regulation, its structure and in-depth understanding of key clauses.
- **The ESI Insurance Mechanism in Mexico, Eduardo Ramos, ASERTA (15 min)**, in this presentation, ASERTA will show the identified challenges during the design phase, key features of the mechanism when embedded in the ESI approach.
- **The Validation scheme, Joel Ramírez, ANCE (15 min)**, during this presentation, the Mexican validator will explain the role and relevance of a third-party independent actor when assessing technology providers and EE projects.
- **The MRV Methodology, Adalberto Padilla, IDB ESI-Mexico Coordinator (15 min)**, this presentation will showcase the main criteria used to design the MRV methodology and its elements.

Questions and answers session

6:00 pm | Cocktail

Day 2 - Thursday, March 2 – Mexico Workshop continuation and interviews

9:00 am | Participants Registration and Reception (Meet and Greet)

9:30 am | Session 5: Energy efficiency project cases in Mexico

This session explores energy efficiency projects that are currently being implemented under the ESI Program in Mexico.

Moderator: Adalberto Padilla

Presentations:

- **Energy Efficiency Project Cases:** – Javier Ortega (45 min), *this presentation demonstrates how the ESI Program is building capacity among technology providers and how it is being structured in a technical approach.*

Project cases:

- Unión de Porcicultores de Guanajuato – Electric motors
- Jade Tropical – Electric motors
- Agrotropics – Cogeneration with biomass

Questions and answers session

10:30 am | Session 6: Technology proponents point of view

For this session, different EE technologies/services providers share their experiences in EE projects for SMEs, industries, and public institutions; barriers encountered and solutions approached to overcome them, and what role the ESI mechanism plays in their business development.

Moderator: Daniel Magallon

Presentation:

- **Rodrigo Calderon, ENERGETIKA (15 min)**, in this presentation, the provider denotes the importance of structuring an energy efficiency project under the Program in Mexico.
- **Guli Lima, ECOCHOICE (15 min)**, in this part, the provider will share experiences with similar insurance schemes, how these reduce risk perception and incentivize investments.
- **Mario Garcia, LATIUS (15 min)**, this provider explains how the ESI approach will be included in its business model as a strategic factor to expanding the project portfolio.

Questions and answers session

11:30 am | Coffee Break

11:45am | Session 7: Panel discussions regarding next steps for the ESI implementation and scale up in Mexico

This session will provide an opportunity for different players acting in the Mexico energy efficiency market to react and provide inputs on how the ESI Program can be further replicated and improved.

Moderator: Enrique Nieto

Panel discussions:

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- **ESI in Energy Management Systems – Ulla Blatt (15 min)**, this presentation will analyze how the ESI approach can synergize with EnMS and energy efficiency measuring equipment.
- **ESI as accelerator for the ESCO market – Manuel de Diego, AMESCO (15 min)**, the association will explain the importance of developing this kind of initiatives through technology providers in order to enhance market penetration and innovation that helps end-users to monetize their energy efficiency projects while mitigating climate change.
- **ESI in the ‘green banking’ product portfolio – Jorge Esquer, BX+ (10 min)**, in this intervention, the Mexican Banks Association will elaborate on the path that the financial intermediaries are taking towards a ‘green’ portfolio.

Discussion and questions & answers session

1:15 pm | Closing remarks

- Maria Netto, BID
- Odón de Buen, CONUEE

1:30 Pm | Interview during lunch with technology providers

- Danish government team
- IDB team
- Latus, Energetika and Ecochoice representatives

3:00 Pm | Interview with FIRA

- Danish government team
- IDB team
- Erick Rodriguez and Javier Ortega

4:00 Pm | Interview with ANCE (certifier) and ASERTA (Insurer)

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- Danish government team
- IDB team
- Jorge Delgado / Joel Miguel, ANCE
- Eduardo Ramos, ASERTA

5:30 Pm | Interview with SENER (in their offices)

- Danish government team
- IDB team
- Santiago Creuheras / Gaby Reyes, SENER

8:30 Pm | Working dinner: IDB and Danish Government Team

Day 3- Friday, March 3 – Closed inception planning session between the IDB and the Danish Government representatives

9:00 pm | Closed session 1: Status of implementation of the ESI program in other countries of Latin America (IDB Offices)

For this session, the IDB will recall main milestones of the ESI Program in the region and the IDB-ESI Country Coordinators will present the ESI Program local status and share their experiences.

Moderator: Maria Netto

Presentations:

- **Brief review of the Program milestones, key beneficiaries and countries of the Program, Esteban Suárez, IDB (10 min),** *this part of the session outlines partner NDBs per country and key milestones and planned activities forward.*
- **Colombia: Luis Restrepo, IDB (20 min),** *in this intervention, a status of the Program in Colombia with Bancóldex will be presented; projects pipeline, insurance product, partnerships, potential replication with other resources (IKI - Finagro), among others, will be analyzed.*
- **El Salvador: Christophe Hoor, IDB (20 min),** *in this part the partnership with Bandedal will be presented as well as how GCF funds will boost the development of the Program; standard contract, insurance mechanism will be presented.*
- **Brazil: Gustavo Pimentel, IDB (20min),** *this presentation will showcase current status of the Program that partnered with three NDBs, Fomento Goiás, Banded, and BRDE in order to leverage EE finance in various subsectors for different regions of the country. Market studies findings, advancements with ESI instruments and providers views will be analyzed.*
- **Peru: Manuel Luque, IDB (20 min),** *in this part the local coordinator will present the sectors and technologies that the Program will cover in the country as well as COFIDES perspective, TSPs association's expectations and energy efficiency potential.*

11:00 am | Coffee Break

11:30 am | Session 2: Planned partnerships and knowledge sharing program

This session will provide a short overview of planned knowledge sharing activities and partnerships.

Presentation:

Maria Netto, IDB (15 min), this presentation will provide an overview of global partnerships with high potential for replication, as well as cover knowledge sharing activities that are helping stakeholders to have a holistic understanding of the Program, sharing experiences in real time, tracking energy savings and promoting the advantages with SMEs. *Discussion and questions & answers session*

1:00 pm | Lunch / Wrap-up with dialogue about next steps and coordination of activities between IDB and the Danish government – agreement on an Aide Memoire

Discussion aspects:

- *Expected general milestones and reporting deadlines*
- *Potential further dissemination, knowledge sharing of the Program, and feasible publications*
- *Lessons learned and further improvement of the Program*
- *Capacity building with the different key actors of the Program.*

5:00 pm | End of activities