
Deliverable 8.2

Exploitation Plan (Business Plan)

Project acronym: **CLIM-CAP**

Project full title:

Competences for a sustainable city development: Qualification scheme for Climate Adaptation in Construction, Architecture and Planning

Project Number: **540313-LLP-1-2013-1-DE-LEONARDO-LMP**

Grant Agreement: **2013-3302**

Sub-programme or KA:

Starting date of the project: 01-12-2013

Closing date of the project: 30-11-2015

Document Control Page				
Title of Deliverable	Exploitation Plan			
Type of outputs / products /results	Report			
Deliverable number	8.2			
Work Package number	8			
Work Package title	Exploitation			
Work Package type	Exploitation of results			
Responsible Beneficiary	EPC/AKA			
Author(s)	Dr. Ulrich Eimer			
Description	Strategic and practical description of planned exploitation activities at consortium and partner level			
Publisher	CLIM-CAP Consortium			
Contributors				
Rights				
Dissemination level	<input type="checkbox"/> confidential, access granted to members of the consortium (including EACEA and Commission services and project reviewers) <input type="checkbox"/> public <input type="checkbox"/> restricted, access granted to <input checked="" type="checkbox"/> internal			
Nature	<input checked="" type="checkbox"/> Report <input type="checkbox"/> Service / Product <input type="checkbox"/> Demonstrator / Prototype <input type="checkbox"/> Event <input type="checkbox"/> Other			
Review status	<input type="checkbox"/> Draft <input type="checkbox"/> WP Leader accepted <input type="checkbox"/> Project Leader accepted <input type="checkbox"/> Project Coordinator accepted <input checked="" type="checkbox"/> Final <table border="1" style="float: right; margin-left: 20px;"> <tr> <td>Where applicable:</td> </tr> <tr> <td><input type="checkbox"/> Accepted by the PSC</td> </tr> <tr> <td><input type="checkbox"/> Accepted by the PSC as public document</td> </tr> </table>	Where applicable:	<input type="checkbox"/> Accepted by the PSC	<input type="checkbox"/> Accepted by the PSC as public document
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<input type="checkbox"/> Accepted by the PSC				
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Action requested	<input type="checkbox"/> to be revised by Partners involved in the preparation of the document <input type="checkbox"/> to be revised by all CLIM-CAP Partners <input type="checkbox"/> for approval by the WP Leader <input type="checkbox"/> for approval by the Quality Manager <input checked="" type="checkbox"/> for approval by the Project Coordinator <input type="checkbox"/> for approval by the Project Leader <input type="checkbox"/> for approval by the Project Steering Committee			
Delivery date	M15 [30/04/2015]			

Content

- Cover Page 1**
- 1. Introduction and main objectives of the Exploitation Plan.....4**
- 2. Product and market situation5**
 - 2.1 The CLIM-CAP product and services5
 - 2.2 Brief description of the target markets and target groups5
- 3. Exploitation framework6**
 - 3.1 Branding and corporate design6
 - 3.2 Product and service specificity.....6
 - 3.3 IPR issues, exploitation agreement (ref. Consortium Agreement)6
- 4. Exploitation strategy7**
 - 4.1 Marketing / Exploitation process phases7
 - 4.2 Exploitation processes8
 - 4.2.1 During project implementation (Start-up and trial phase).....12
 - 4.2.2 After project implementation (Trial and expansion phase)12
- 5 National, partner-specific marketing and exploitation activities14**
 - 5.1 Germany.....14
 - 5.2 Hungary.....15
 - 5.3 Netherlands16
 - 5.4 Spain17
 - 5.5 United Kingdom18
- 6 Success indicators and fall-back strategy.....21**

Annex

1. Introduction and main objectives of the Exploitation Plan

CLIM-CAP is a European co-funded project to develop and put into practice an innovative training course focusing on adequate means and measures to reduce the existing and expected effects of climate change mainly in built-up areas. The training is designed for planners, architects and other practitioners working in the context of construction and planning as well as for consultants to topic related organisations. The project focuses on developing a target group specific curriculum and a broad content base which is necessary to carry out high quality training. Pilot training will be held in all participating countries, evaluated and subsequently optimised. The training is designed to follow a blended-learning / multi-platform learning scheme.

In the long term, the project's product, the training course, will be offered in several European countries on the basis of the given market conditions. Therefore, it is important to:

- analyse the market conditions and demands in the target countries,
- develop a high-quality product according to the target group demands,
- test the training course under practical conditions during the pilot phase,
- adapt the product to national or regional conditions if necessary,
- plan and apply adequate dissemination and marketing activities.

During the CLIM-CAP project implementation several work phases deal with the above aspects. Respective documents, such as e.g. the "Detailed Market & Demand Analysis" and the "Communication and Dissemination Plan", represent selected project tasks. The "Exploitation Plan" describes measures and processes on how to successfully implement an exploitation strategy at European (project) level, as well as at national or regional level. The latter will be represented by individual partner marketing and exploitation strategies.

In particular, the Exploitation / Business Plan aims to:

I. Exploit the product economically

- Approaching future clients and building up a solid client base
- Placing the product in the respective markets

Parallel to the Exploitation Plan the Dissemination / Communication Plan focuses on:

II. Increase product awareness at the target group level

- Providing the relevant target groups with high quality information concerning the product
- Informing further interest groups, networks and multipliers about the product
- Widening awareness beyond the actual geographical project scope

The Exploitation Plan, therefore, briefly describes the results of the market and the product analyses which were carried out at the start of the project. Aspects of the project's dissemination activities will be taken up and partly integrated into the exploitation strategy. Therefore, the dissemination instruments of the "Communication and Dissemination Plan" will be directly related to the target groups and marketing phases. Based on these findings, an overall exploitation strategy for the project will be developed. In order to respect national and regional specifics exploitation measures at partner level will be considered.

2. Product and market situation

2.1 The CLIM-CAP product and services

The CLIM-CAP main product is an innovative vocational training course for multiplier organisations, consultants and practitioners working in the field of planning and construction (see also the target group definition in chapter 2.2). This blended-learning course, with alternating physical meetings and online learning phases, will be implemented in all participating countries. The course will take the different national planning processes and legislative prerequisites into account by adapting curriculum structures and training content to the national conditions. The market analysis is one basis for these adaptations.

The overall duration of the training will be 12 weeks including four physical meetings of two days duration each. During the whole duration of the pilot course a qualified mentor / trainer will advise and support the participants. The pilot training will be carried out in each of the participating countries. The assessment and evaluation process to be applied, both during and beyond the project duration, will support a continuous improvement of the training course leading to a marketable product in the long run.

The curriculum will be adapted to the needs of the primary target group taking into consideration that most of the participants hold an academic degree, or relevant professional qualification and already have professional experience. Therefore, the training will give an overview on basic aspects of climate relevant factors such as heat, wind and water. On this basis, the methods and strategies on how to develop and practically apply climate maps, as well as a variety of adequate measures to reduce the effects of urban heating or flooding will be presented and discussed. Practical examples reflecting the opportunities to implement such measures, considering the given planning and construction laws in the different countries also play a crucial role in the training. Communication and participation processes, which enable the implementation of climate adaptation measures, are also considered as part of the training.

At the end of the training course an examination will be carried out to evaluate the participants' learning success. The training course will thoroughly consider the ISO17024 quality standards ensuring that its participants will be certified accordingly.

2.2 Brief description of the target markets and target groups

CLIM-CAP mainly addresses professionals and consultants in the field of urban planning, architecture, urban design and landscape architecture. Among these groups many multipliers can be identified.

A market and demand analysis considering the target groups was carried out in WP2. This study covers the project partner countries Netherlands, England, Hungary, Germany and Spain. From the Market Analysis it can be derived that there is both a market need and a niche for a training course as intended by the CLIM-CAP project. The main challenge will be to successfully impart the complexity and high quality of knowledge within the short timeframe of the CLIM-CAP training course.

Detailed information concerning the market situations can be found in the respective deliverable.

3. Exploitation framework

3.1 Branding and corporate design

The main aspects of the CLIM-CAP corporate design are laid down in the project Communication Plan. The colours, the logo as well as other graphic elements represent a partnership of highly acknowledged institutions working mainly in the field of education, planning and training. During the project implementation, the corporate design represents the project, in the long run it should also be used for the product placement. If needed, an update of the corporate design should be considered which could form the branding of the product to be disseminated in the different countries.

For the time after project termination the (optional or mandatory) use of the graphic elements needs to be clarified between the project partners and specified in the Exploitation Agreement.

3.2 Product and service specificity

In order to maximise efficiency, all exploitation measures need to be specifically suitable for the target group of the CLIM-CAP product. Therefore, the dissemination and marketing measures are chosen according to their:

- **target group adequacy – the potential to reach the target groups effectively**
- **product adequacy**
- **practical applicability**
- **sustainability in terms of the cost/benefit ratio**

3.3 IPR issues, exploitation agreement (ref. Consortium Agreement)

The preparation of the exploitation of the CLIM-CAP results started in M2 with the provision of the Consortium Agreement that lays down aspects of content rights and IPR and is agreed by all partners. The Exploitation Agreement provides a further framework for the clarification of IPR with regard to the exploitation of project results after the project ends. This agreement covers the practical handling of content usage and exploitation.

4. Exploitation strategy

4.1 Marketing / Exploitation process phases

The overall exploitation framework can be divided into three phases, the “Start-up Phase”, the “Trial Phase” and the “Expansion Phase”. These phases represent major steps towards the establishment of an economically viable product placement. To a certain degree, these phases can also be used as success indicators or milestones in the overall exploitation process chain.

A) Start-up Phase

The Start-up Phase covered the initial phase of the project when direct contact with the future clients needed to be established. It can also be seen as an orientation phase because it is not clear at this stage if the services and products will be appropriate or available at the end of the project. The Start-up Phase ends when the curriculum is established and the first set of contents has been prepared. The national business plan specifics, in chapter five, have been collected during this phase. It is advisable to repeat this survey at a later stage of the project and product implementation.

In particular, the following general actions need to be put into practice during the Start-up Phase:

- Detailed / final definition of the target groups
- Listing of potential client (organisations) in the countries and regions
- Grouping of the organisations according to identified demands
- Preparation of basic information material
- Preparation of templates for contact letters and e-mails
- Establishing of first contacts to the future clients
- Surveys and interviews to identify practical client demands, existing organisational or administrative barriers as well as the existing level of knowledge
- Development of a CLIM-CAP corporate design and brand

B) Trial and Evaluation Phase

The Trial and Evaluation Phase starts with the preparation and realisation of the first pilot training. This phase will continue also after the project ends since the process of trial, evaluation and optimisation of the training is a crucial process for the future success of the product on the market. The optimisation will partly be carried out during the project implementation phase after the pilot testing and will aim to reach a critical number of clients. To reach as many clients as possible broad marketing measures are needed.

For example, it is necessary to:

- Prepare and disseminate product-specific information material

- Contact clients, particularly thematic networks, associations, lobby groups and multiplier organisations
- Present the CLIM-CAP product at conferences and fairs
- Evaluate and optimise the product in cooperation with future client groups
- Establish local / regional information campaigns
- Further development of a CLIM-CAP product specific brand
- Lobby EU, national, regional and local institutions

C) Expansion Phase

The Expansion Phase covers the post-project period only. The main purpose of this phase is a) the consolidation, and b) the expansion of the client base and the introduction of the product to new markets. These new markets may be outside the current reach and scope of the project partners and therefore the Expansion Phase is not necessarily limited and may possibly run for several years.

In particular, the following actions need to be put into practice:

- Establishing a profit generating product
- Realisation of long-term marketing measures
- Extension of the client base
- Extension of the geographical scope of product availability
- Introduction of marketing measures in the new markets
- Lobbying EU, national, regional and local institutions



Fig. 1: Project and Marketing phases

4.2 Exploitation processes

Based on the above stated dissemination and marketing aspects an overall exploitation strategy for the CLIM-CAP product is needed. This strategy is rather general compared to the individual measures and strategies described in chapter five for the national and regional levels. The following tables indicate which of the instruments are suitable according to time (long and short-term), target groups and market phases. The short-term phase comprises mainly the project duration whereas long-term means the following exploitation period.

Table 1 – Long- and short term exploitation instruments

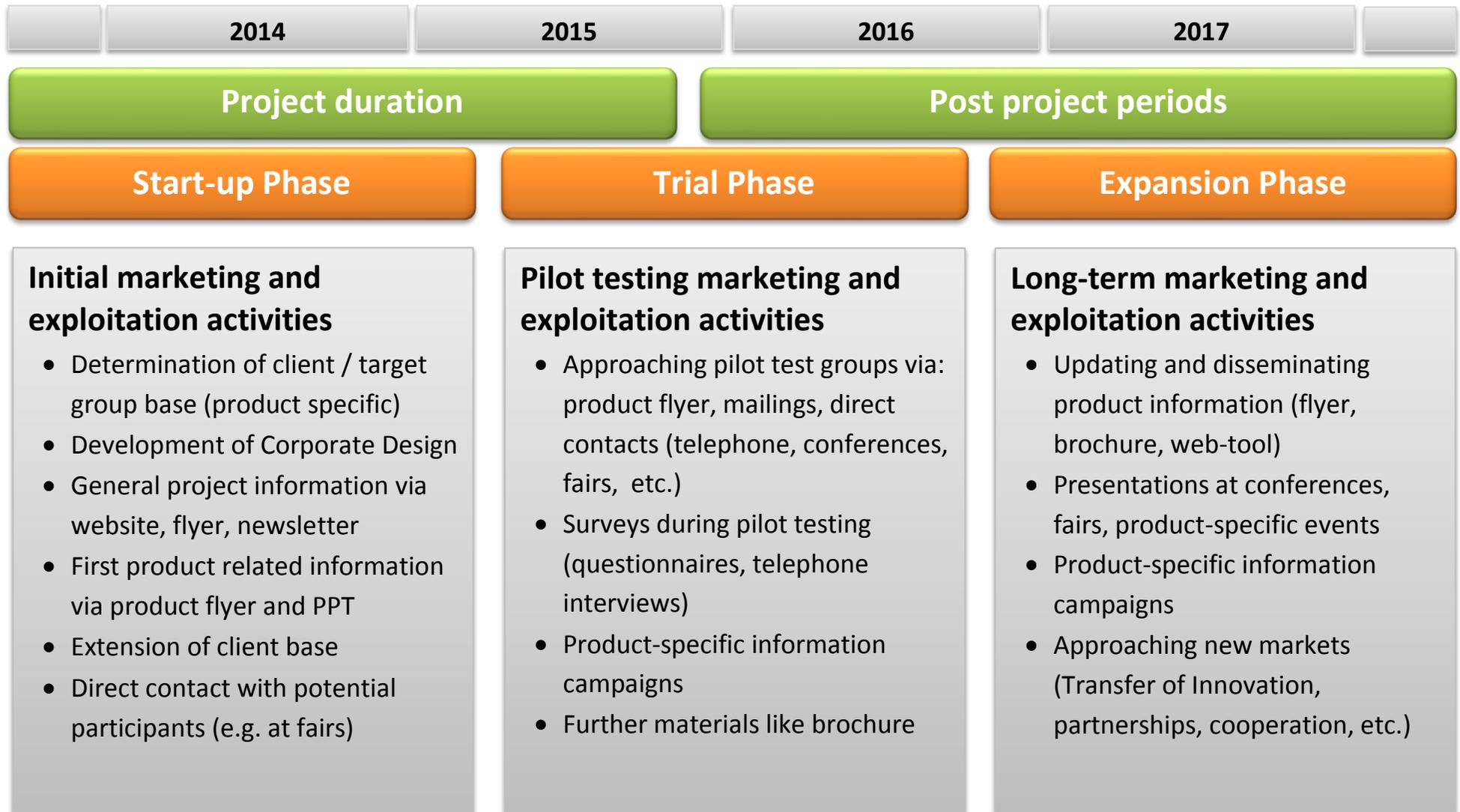
	Short-term	Long-term
Traditional dissemination and marketing instruments		
Flyer	X (Project flyer)	X (Product flyer)
Power Point presentation (PPT)	X (Project PPT)	X (Product PPT)
Poster	X	X
Newsletter	X	X
Press release / Media communication	X	
Online dissemination and marketing instruments		
Websites (Product, project or partner websites)	X (Project website)	X (Partner / Product website)
Banner / link campaigns	X	
Direct dissemination and marketing instruments		
E-mailings	X	X
Online questionnaires	X	
Conferences		
Workshops	X	X
Conferences and fairs	X	X
Individual marketing		
Individual marketing events (at the clients' venue)		X
Economically driven incentives		
Discount periods for participation in the trainings		X

Table 2 – Marketing Instruments and marketing phases¹

	Start-up Phase	Trial Phase	Expansion Phase
Traditional dissemination and marketing instruments			
Flyer	X (Project flyer)	X (Product flyer)	X (Product flyer)
Power Point presentation (PPT)	X (Project PPT)	X (Product PPT)	X (Product PPT)
Poster	X	X	X
Newsletter		X	X
Press release / Media communication	X	X	X
Online dissemination and marketing instruments			
Websites (Product, project or partner websites)	X (Project website)	X (Partner / Product website)	X (Partner / Product website)
Banner / link campaigns		X	X
Direct dissemination and marketing instruments			
E-mailings		X	X
Online questionnaires	X		
Conferences			
Workshops		X	X
Conferences and fairs		X	X
Individual marketing			
Individual marketing events (at the clients' venue)		(X)	X
Economically driven incentives			
Discount periods for participation in the trainings			X

¹ Marketing phases are in detail described in Chapter 4.2.

Fig. 2: Timeline for the overall exploitation steps (Exploitation strategy)



4.2.1 During project implementation (Start-up and Trial Phase)

A. Initial project related exploitation activities

The first steps of exploiting the project's results already start with the beginning of the project itself. Information campaigns about the project and its results are important initial exploitation activities for the future product. During this phase it is necessary to disseminate information via flyers, brochures, website, newsletters and mailings, etc. These activities pave the way for any other later exploitation measure. In the first twelve months of the CLIM-CAP project this phase has already been carried out to a certain degree.

Traditional marketing and exploitation instruments underpin the reliability of a product. A mixture of offline and online marketing measures increase the probability to reach as many members of the target groups as possible, regardless of e.g. age, communication behaviour or organisational background

B. Preparation and realisation of pilot seminars - testing phases

The Trial Phase starts during project implementation and may continue also after the end of the project. This phase comprises the:

- a) Recruiting of participants
- b) Realisation of the pilot trainings
- c) Evaluation, reporting and proposal list for the optimisation of the product
- d) Advertising the product (at different levels)

The Trial Phase is of utmost importance for the long-term market success of the training course since only a market and target group oriented product will in the long run be successful on the markets. Thus, further evaluations after the end of the project will be necessary to maintain steady quality and up-to-datedness of the product.

4.2.2 After project implementation (Trial and Expansion Phase)

As mentioned above the testing phase will continue after the end of the CLIM-CAP project. This is necessary to provide a product which can respond to the market and meet the clients' demands. Further product testing, carried out after the project completion, might be arranged differently if no external funding is available and/or fees may need to be paid for taking part. The evaluation process might also be shorter and less broad than during project implementation.

Concerning the evaluation, optimisation of the training product the following steps are needed:

- Recruiting of test participants (under the given non-funded situations)
- Preparation of a suitable, efficient evaluation process (based on the one used during the project)

- Realisation of the product testing
- Evaluation of the training and analysis of results
- Continuous optimisation (adaptation) of the product
- Continuous marketing of the optimised solutions (“always innovative and close to the market”)
- Advertising the realisation of seminars after project duration
- Opening up new markets

Developing long-term customer relations is the main issue for the successful placement of products and services. In particular, the future CLIM-CAP training course clients expect continuous improvements in quality and quantity as well as demand-driven developments of new services.

5 National, partner-specific marketing and exploitation activities

5.1 Germany

“Akademie der Ruhr-Universität” (AKA)

The demand for an innovative EU-accredited training qualification product like CLIM-CAP exists especially with local municipalities as well as various institutions in Germany. Approaching professionals from the built environment sector, e.g. planners, the training course will mainly target architects. The overall target market for the CLIM-CAP training product entails a broader cluster of professionals working in the public sector concerned with the sustainability in general and particularly in public or private offices for climate change. The chances of success to establish this training in the German market will depend on the final break-even point. Nevertheless, the AKA is optimistic that a long-term instalment can succeed, especially with regard to the already existing platforms and sources that are necessary for the implementation of academic activities and the realization of the training. Other regional limitations e.g. no eLearning aspects, no site visits or lesser face to face meetings do not apply in Germany. Nevertheless, a possible modification of the training to address specific regional needs might occur once the final structure and the content is laid out.

The general business plan strategies for placing the training product on the market vary. Each strategy is highly depend on the category of the course, possible subsidies and based on Return on Investment (ROI) scheme in general. The main features of the strategies comprise the distribution of information through networks. These include corresponding platforms as well as the AKA homepage. Further advertisement of the product will be conducted by getting in touch with appropriate institutions and cities, informing them about CLIM-CAP. Another dissemination measure that supports the spread of information are brochures and newsletter that are send to the aforementioned multipliers. Currently, the AKA does not see a specific business plan strategy for CLIM-CAP due to the variable feasible criteria. Within the German market the AKA will offer the program as a full course.

The minimum fee that is required from the trainees does vary in relation to the respective total number of participants attending. At the current state, i.e. twenty trainees, the AKA estimates that a fee of 1.500 – 2.000 € is necessary to run the training economically viable. The maximum fee costs on the other hand should not exceed a sum of 4.000€ for the CLIM-CAP training course in order to be well received on the market.

5.2 Hungary

“Energiaklub” (EK)

The Hungarian situation depicts other circumstances in terms of demand. Due to the current extreme weather conditions and the funds available for adaptation measures raised the interest of adaptation trainings in Hungary. EK sees three different channels to stimulate requests for a qualification product that offers professionals the practical skills and knowledge required to plan effective climate change adaptation measures.

A first strategy aims to promote CLIM-CAP at universities who take on the training qualification program as courses. A second concept embeds rural development action groups that could participate in the training. Furthermore municipalities could attend the training. A differentiation of course length and contents could help to create a target group specific qualification product. For example, a full or short version that includes climate aspects from their requirement list during planning processes could be customized to the special needs of the course participants. As already pointed out, EK sees the main target groups for the CLIM-CAP training product in municipality employees, architects, landscape architects and urban planners as well as in rural development action groups of towns above 50.000 inhabitants. Accordingly, the overall target market consists of rural development action groups, municipalities and universities. EK assumes that financial support for the municipalities will likely raise the chances to establish this training in the Hungarian market for the long-term. Other than that, the NGO does not see any hindrances or regional limitations to the training in its original product form, if focusing on the mid-size cities in Hungary.

A general / overall business plan strategy with details of the main phases and features is currently not available at EK. A specific business plan strategy contains the earlier introduced idea of supplying a shorter version of CLIM-CAP for municipalities. That way, special needs of the customers can be taken into consideration e.g. climatic aspects that are required during planning processes. EK plans to offer CLIM-CAP training as a ‘package’ to the Hungarian market. The courses will be for a particular region, a local authority or even topic based. Possible options include for example the broad topics of temperature and water.

Based on the calculation of cost items that need to be considered for carrying out CLIM-CAP training the minimum fee required from the trainees to run the training economically viable is 275 € without a ISO certification fee and 425 € with it (cf. table 3). The price calculation includes all phases, offers and contents of a pilot training course with a group size of maximum twenty people. The EK estimates that the maximum fee for this training qualification is around 400 – 500 €. The assessment is based on the straight comparison with other course prices of similar content alignment.

5.3 Netherlands

“Wageningen Academy” (WBS)

For Wageningen Academy CLIM-CAP can be a supporting measure to raise awareness among different multipliers that the professionals who work to plan, design, build and maintain the built environments of our cities, towns and villages need to integrate climate change adaptation to build resilience. At the moment there are activities concerning this matter within research programmes as well as with some (progressive) policy makers. While professionals are getting aware of the topic, Wageningen Academy is not certain if this will directly result in a clear demand for the CLIM-CAP training. A positive result of the pilot training is that quite a range of professionals is aware of this training and they are interested. However, in the Netherlands quite a large number of planners are unemployed at the moment; these people might be interested in this kind of training course albeit having a small budget. Also the architects and planners working for consultancies, have limited budget for this course. On the other hand is the fee to hire teachers and trainers rather high in the Netherlands (high salary costs). Other target groups that are approached with the training comprise diverse professionals in the field of urban planning, urban design, landscape architecture and architecture. Furthermore employees working for the government, for planning and consultancy agencies and self-employed professionals belong to the target group and overall target market. In the event of a successful pilot training course there might be long-term chances to establish this training in the Dutch market for approximately 15 professionals per year. The expected costs of the training however can be a threat to the long-term implementation of CLIM-CAP. The Wageningen Academy proposes therefore a concept that splits the different modules in several courses or develop a concept that also serves a wider target group. The approach solves the cost aspect is, however, less preferable from a didactic point of view.

The general business plan strategy of the Wageningen Academy involves a series of phases and measures. The course is developed with prominent professionals in the field in advance to ensure the quality of the curriculum and content will meet the demands among professionals. Another method that can be carried out is a small market research. Furthermore, Wageningen Academy engages an estimation of the overall training need and develops a cost breakdown including a realistic course fee and a realistic estimation of the number of participants. With regard to a specific business plan strategy the course fee is expected to raise discussion. Another point that has to remain open until the pilot phase is concluded is the question in what format CLIM-CAP is offered to the Dutch market.

The minimum fee required from the trainees to run the training economically viable amounts accordingly to the Wageningen Academy estimation up to 3.000 €. Seeing that this is quite a high sum CLIM-CAP is very cost-intensive in the Netherlands. The costs for participation do probably meet or even slightly exceed an estimated maximum fee for this EU-accredited training qualification product.

5.4 Spain

“Universitat Politècnica de Catalunya” (UPC)

The up skilling of built environment professionals by integrating scientific findings of climate adaptation into urban development and planning practice has not yet taken place in Spain. The demand for a training product like CLIM-CAP, as well as publicity for the topic, must to be investigated in the country. The principal target group of architects, working in public administrations, does not have the necessary funds nor the public resources for this type of qualification training. The other target groups include professionals from the built environment sector, e.g. urban planning, urban design and landscape architecture. The overall target market for the CLIM-CAP training product approaches professionals in the public sector concerned with sustainability in general and also employees and self-employed individuals in public or private offices for climate change. Considering the current economic situation in Spain it is really difficult to estimate a successful implementation in the market for a short term. Hence, the long term chances of success are impossible to define as the training program is highly depending on the development and fluctuations of the economy. The UPC considers regional limitations (i.e. no eLearning aspects, no site visits and lesser face to face meetings) as non-existent since the necessary platforms and sources for the implementation of academic activities are already present. If there are modifications of the training course needed the UPC will be able to react once the final structure and the content is certain.

The UPC has more than one overall/ general business plan strategy prepared. Each strategy is contingent on varying prerequisites such as the course being official or non-official and is defined accordingly. The same way of proceeding takes place for the main phases and single features of each strategy. As a result the UPC currently does not see one specific business plan strategy. Bringing CLIM-CAP to the Spanish market comes to pass through the distribution of information via mailing lists to alumni as well as professional associations. Further dissemination occurs with the help of press releases, publications and the presentation of transpired activities in educational fairs and international exhibitions.

The very basic estimation of the UPC resulted in 1.500 € as the minimum fee required from the trainees to run the training economically viable. However, the actual sum depends on the final requirements that are defined by the consortium in the exploitation agreement. A final detailed syllabus that considers the stipulated demands and expertise of required trainers is needed to generate the definite costs of the training program. The estimated maximum fee for the CLIM-CAP training course is determined at 2.500 € but also depends on the same previously defined requirements.

5.5 United Kingdom

Training legacy strategy for the “Town and Country Planning Association” (TCPA)

The integration of innovative approaches and adequate knowledge in respect of climate change adaptation measures at the local level is widely lacking in the UK. Planners are mainly focused on the growth agenda; have experienced large-scale reductions of staff resource; have no budgets for training and do not have adaptation or climate change as a priority. This situation has been made worse with the change of Government in May 2015 and it is unlikely that this will change in the next five years.

Therefore, the TCPA has to stimulate the demand for upskilling planners to cope with the challenges of climate change by devising courses which can be directly linked to the growth agenda – i.e. practical, economic and linked to making the case for climate change adaptation initiatives in relation to the potential for cost-savings. The main target group for the CLIMCAP training are planners in both the public and the private sector, in local authorities or consultancies, urban designers and landscape architects.

In order for the CLIMCAP training to be effective after the end of the project, and to add value to the professional climate change training, the TCPA will further develop interchangeable modules which are linked to the key priorities for planners – whether in the private or the public sector. We will explore and develop training opportunities with local authorities to unite different departments (such as energy, natural resources, transport and health) with planning and development management to create a holistic approach to the challenges of climate change and to collectively identify adaptation solutions based on the CLIMCAP project.

In terms of costs, because there is no budget for local authority planners to attend training, it is unlikely that we can charge anything – but with sponsorship the courses could go ahead. Therefore, this approach, i.e. offering a course to a single, large, local authority would, we believe, be cost-effective, practical and replicable. The authority would provide the venue, e-links and site visits, and wherever possible we would aim to attract sponsorship from a developer, investor or retailer in order to subsidise the cost of the trainee places.

We would also take the same approach for planning consultants and also develop some courses in partnership with the private sector.

In conclusion, it is our intention to include the CLIMCAP training modules in the 2016 Business Plan, to be run commercially throughout the UK.

Cost categories		Cost calculation / estimation for one future CLIM-CAP seminar in €			
Country	Germany	Hungary	Netherlands	Spain	United Kingdom
Teacher's Salary / Fees (€/hour and total in €)	800-900 €/day (high)	2.920 € in total	125 € /hour, exc. VAT)	180 - 260 €/hour	Two trainers @ 600 – 1,000 €/day xxx/xxx
Room rent (per course)	200 - 300 €/day (medium)	400 € in total	10.500 € Including catering	300 - 400 €/day (medium)	750 €/day
Training Equipment (per course)	Can be provided.* ¹	0 €	500 €	n/a	n/a
Marketing Costs (if not included in coordination costs)	250 - 500 € per year	166 €	2.000 €	2.500 - 3.500 €/edition	750 €/event
Content Maintenance (share per course)	Can't be defined now.	n/a	Can't be defined now	n/a	n/a
Catering (per course)	20 - 50 €/day (low* ³)	n/a	Included in rooms	20 €/person (* ³)	30 €/person 20 people = 500
Content Management System + Maintenance (share per course)	Covered already.	n/a	1.500 €	n/a	n/a
Excursion Costs (per course)	200-300 €.	400 €	1.000 €	500 €	100 €/person
Trainers Travel (if not included in any other cost category)	Included in excursion costs.	640 €	Included in fee	500 €	500 €/person + event

Coordination Costs (share per course)	Management and Assistant on site roughly 3000 €	1000 €	8000 € (6000 € Management; 2000 € back office)	150 - 250 €	6 days staff time per event @500 , 3,000
Min. / Max. number course participants	xx / xx	20 / 20	14 / 20	10 / 20	xx / xx
Min. Course Fee needed (€ / p.P.)	2000 – 2.500 €/person	245 €/person	3.000 €/person	1.500 €/person	1.376 €/person
Sponsorship needed (per course)			10.000 €/course for content maintenance and development	2.500 €/person	8,000 per event

*¹ Depends of the needs defined in the structure contents of the course.

*² Depends of the final requirements defined by consortium in the exploitation agreement.

*³ Considered are coffee breaks only.

6 Success indicators and fall-back strategy

Indicators for the evaluation of marketing / exploitation strategies' success can be quantitative or qualitative. To keep it simple and measurable only two main quantitative success indicators are proposed for the CLIM-CAP product placement:

1. **Product perception: target group / audience reach**
2. **Product success: number of clients / seminar participation**

Product perception: target group / audience reach

Product perception is the key success factor for any marketing / exploitation strategy. The main objective of all marketing measures is to make the product known among the defined target group. Only if a critical number of the target audience perceives the product there is a chance for the sales to increase.

Telephone/online/email surveys via questionnaires will be appropriate instruments to measure this after the project end. These recommended surveys need to be repeated frequently; the division into different sub target groups might be an adequate measure to get a more detailed and precise picture concerning the development of the product perception. In addition, it is of utmost importance to include the questions concerning the impact of every marketing instrument into the surveys!

Product success: number of clients / seminar participation

The decisive indicator for the economic success of the training product is the number of persons attending the seminars. These figures are easy to ascertain since for each seminar there are participant lists. It will be important to compare the development of attendance a) in the course of the time (starting with the first seminar after the pilot training) and b) as regards the geographical development of seminar participation (at regional, national and EU-level).

It is advisable that each organisation exploiting the CLIM-CAP training product carries out additional activities to measure the marketing success. The scale mainly depends on the resources (finance, staff) which are available for this at institutional level.

The results of the above mentioned surveys will be the basis for further analyses of the marketing activities and the product itself. For both aspects interventions (**fall-back strategy**) are necessary in case that the results are unsatisfactory.

Analyses and fall-back strategy for single marketing instruments

The surveys concerning the product perception will be designed also to measure the effect of each marketing instrument. If there are instruments with no or minor impact on the target audience they should not be applied anymore or changed structurally. As a result only those instruments will be used which are adequate for the product specific



Competences for sustainable city development

target group. A continuous proof of effect followed by changes and replacements is very important for the product's success.

Analyses and fall-back strategy concerning the product quality and adequateness

As a result of the product perception and its success it is to be analysed which of the product elements need to be adapted to the clients' needs. Although the pilot testing will have produced profound results on this it will be important to keep up the process of analysis and improvements on a regular / continuous basis. Information for the improvements will be gathered through both the product perception surveys and (mainly) the inquiries of the seminar participants after each seminar.

Annex I: Exemplary Cost Analysis

Cost analysis for an exemplary ClimCap training course

	Start of Term	End date												
Term	05/2016	09/2016												
estimated number of participants	10													
seminar day(s)	6													
participation fee (daily)	300 €													
participation fee (total per participant)	1.800 €													
	number of participants	5	6	7	8	9	10	11	12	13	14	15	16	
30 Turnover		9.000 €	10.800 €	12.600 €	14.400 €	16.200 €	18.000 €	19.800 €	21.600 €	23.400 €	25.200 €	27.000 €	28.800 €	
Marketing														
120 Mailing: Costs for Printing and Mailing of Infomaterial														
120	Circulation:	500	250 €	250 €	250 €	250 €	250 €	250 €	250 €	250 €	250 €	250 €	250 €	
	Costs per piece:	0,50 €												
On site Expenses														
150 Occupancy Expenses for 6 day(s)		150 €	900 €	900 €	900 €	900 €	900 €	900 €	900 €	900 €	900 €	900 €	900 €	
170 Catering (Coffee, Tea, Fruits etc.)		20 €	600 €	720 €	840 €	960 €	1.080 €	1.200 €	1.320 €	1.440 €	1.560 €	1.680 €	1.800 €	
160 Material, Copies, Books, Flipcharts etc.		5 €	150 €	180 €	210 €	240 €	270 €	300 €	330 €	360 €	390 €	420 €	450 €	
Lecturere Expenses														
130 Director of Studies		250 €	250 €	250 €	250 €	250 €	250 €	250 €	250 €	250 €	250 €	250 €	250 €	
100 Lecturer fees (800 € daily rate)		800 €	4.800 €	4.800 €	4.800 €	4.800 €	4.800 €	4.800 €	4.800 €	4.800 €	4.800 €	4.800 €	4.800 €	

Others

200 Exkursion	200 €	200 €	200 €	200 €	200 €	200 €	200 €	200 €	200 €	200 €	200 €	200 €	200 €
Contribution Margin (CM) I	1.850 €	3.500 €	5.150 €	6.800 €	8.450 €	10.100 €	11.750 €	13.400 €	15.050 €	16.700 €	18.350 €	20.000 €	
CM I in %	20,6%	32,4%	40,9%	47,2%	52,2%	56,1%	59,3%	62,0%	64,3%	66,3%	68,0%	69,4%	
Overhead - Staff Expenses													
140 planning and preparation: 6 day(s) per implementation/term	6	1.800 €	1.800 €	1.800 €	1.800 €	1.800 €	1.800 €	1.800 €	1.800 €	1.800 €	1.800 €	1.800 €	1.800 €
140 participant management: 1 h per participant (application and accounting)	1	188 €	225 €	263 €	300 €	338 €	375 €	413 €	450 €	488 €	525 €	563 €	600 €
140 on site-assistance (assistant): 5 day(s) per implementation/term	5	500 €	1.500 €	1.500 €	1.500 €	1.500 €	1.500 €	1.500 €	1.500 €	1.500 €	1.500 €	1.500 €	1.500 €
140 evaluation: 1 day(s) per implementation/term	1	300 €	300 €	300 €	300 €	300 €	300 €	300 €	300 €	300 €	300 €	300 €	300 €
Contribution Margin (CM) II	-	938 €	- 325 €	1.288 €	2.900 €	4.513 €	6.125 €	7.738 €	9.350 €	10.963 €	12.575 €	14.188 €	15.800 €
CM II in %		-10,4%	-3,0%	10,2%	20,1%	27,9%	34,0%	39,1%	43,3%	46,8%	49,9%	52,5%	54,9%
general Overhead of your institution (20%)	20%	1.800 €	2.160 €	2.520 €	2.880 €	3.240 €	3.600 €	3.960 €	4.320 €	4.680 €	5.040 €	5.400 €	5.760 €
Contribution Margin (CM) III		-2.738 €	-2.485 €	-1.233 €	20 €	1.273 €	2.525 €	3.778 €	5.030 €	6.283 €	7.535 €	8.788 €	10.040 €
CM III in %		-30,4%	-23,0%	-9,8%	0,1%	7,9%	14,0%	19,1%	23,3%	26,8%	29,9%	32,5%	34,9%
daily rate: staff member (of your institution)	300 €												
daily rate: assistant staff member (of your institution)	100 €												