

**A guide book
on preparing technology transfer projects**

Preparing and presenting proposals

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Content

- Background
- Approach
- Deliverable
- What next?

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Background (1)

- **Background**

- 2 workshops on innovative financing in Montreal (2004) and Bonn (2005)

- **Outcome**

- A ‘disconnect’ exists among development professionals, entrepreneurs who identify projects and those who provide resources (services and funding). Evidenced in UNFCCC workshops and in an enormous body of day-to-day communications.
- Many ‘fit for purpose’ tools and many general ‘how-to’ instructions but there exists a need for a more complete, accessible, balanced, process oriented and modular guide to preparing and presenting proposals.

Background (2)

- **Objective**
 - Assist project developers in DC in preparing project proposals that will meet the standards of international finance providers
 - “Better projects, increased funding and shorter funding cycles enabled through enhanced toolkits.”
- **Mean**
 - ‘A guide book on preparing technology transfer projects - Preparing and presenting proposals’
- **Target groups**
 - Project developers - public and private (‘champions’)
 - Finance providers – local and international (‘enablers’)

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Approach (1)

- **Consultant with first hand experience**
- **Steps**
 - Needs assessment and survey of existing guides
 - Development of the practitioners' guide
 - Presentation and publication of the practitioners guide
- **4 (stand alone) modules**
 - Before preparing a proposal
 - Preparing a proposal
 - Customizing a proposal
 - Presenting a proposal

Approach (2)

- **7 question approach:**
 - What? Where? Who? How? Why?
 - What if? To whom?
- **PG includes examples, worksheets and references**
- **Final products**
 - Hardcopy in Eng, Fra, Spa
 - Electronic-copy on CD and TT:CLEAR

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The aim of this guidebook is to assist project developers in developing countries and other stakeholders in preparing financing proposals that will meet the standards of international finance providers. Better projects, increased funding and shorter funding cycles can be achieved through tools, such as financial software, that are accessible to both project developers and finance providers. It is our hope that this guidebook and its accompanying templates will improve communication between these two groups and thereby enhance the diffusion of climate-friendly technology.

Preparing and presenting proposals: A guidebook on preparing technology transfer projects for financing



Preparing and presenting proposals

A guidebook on preparing technology transfer projects for financing



Content of the practitioners guide

- **Summary (self-contained)**
 - What, Where, Who, How, Why, What If and To Whom?
- **BEFORE Preparing a Proposal**
 - Accounting, finance, scheduling + Team assessment
- **PREPARING a Proposal**
 - Eight tasks, assisted by templates
- **PRESENTING a Proposal**
 - How to assess needs and who to target?
- **CUSTOMIZING a Proposal**
 - Logical framework, carbon benefits, lenders and investors
- **Templates, Available websites**

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What next ?

There is a need for establishing a concrete roll-out programme for the dissemination and use of the practitioners' guidebook. It is recommended that this plan is based on the following four building blocks with consideration given to necessary promotional and training activities:

- Learning centres to be held in conjunction during the sessions of the subsidiary bodies targeting different categories of audiences;
- Regional training sessions and offering hands-on training courses and assistance to prepare qualitative financing proposals by national project developers;
- The creation of a facility like a help desk to assist, to collect feedback and to give advice;
- The set-up of a project finance facility to help project developers to present their proposals to finance practitioners.