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Project Assessment Template, co2 cloud icon, wooden cubes with reduce carbon dioxide emissions

Project Assessment Template

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***On this page:** The project assessment in Appendix B will focus on the following objectives and criteria to conduct a further evaluation of the priority projects identified. Read more below, or visit [Strategic Guidance for Country System Assessments](#), [Guidance for Countries in Assessing ERC Projects](#), or [Mobilizing ERC Finance](#).*

Introduction to the Framework - Appendix B

The project assessment is found in [Appendix B](#). It is a more detailed review into the project's attributes and mechanisms relative to best practice. The assessment will focus on the following objectives and criteria to conduct a further evaluation of the priority projects identified.

Objective

Financial value (F): Assess and test project's value maximization potential

[F1. Pro](#)

[F2. Ad](#)

[Q1. MF](#)

Quality execution (Q): Evaluate potential that target values can be secured in implementation

[Q2. Ma](#)

[Q3. Pro](#)

Core principles (C): Assess risk of not meeting core principles based on technology type and mitigation measures

[C1. Car](#)

[C2. Em](#)

[C3. Soc](#)

Strategic national alignment (S): Evaluate project's contribution to the wider economy

Process to conducting assessments

For this exercise, the project's closeness to best practice or alignment with market expectations is rated for each subcomponent, where the overall rating for the criterion will be based on an average of the project's rating across all subcomponents.

Given that there are multiple subcomponents for each criterion, and that compliance for these will likely be in a spectrum, the guideposts provided in Chapter IV will describe the level at which projects are at "best practice" and the level at which they have "some opportunities for improvement", beyond which the user of the Guidelines can use the following approach to assign the other ratings, as follows:

- Best practice or alignment with the market: Project's documentation and/or evidence for the specific component points to all the attributes being met in whole to enable achievement of the overall objectives.
- Good practice or alignment with the market: One or two key attributes of the best practice guidance may not be met, but the project as a whole has more attributes than in the "some opportunities for improvement" level.
- Some opportunities for improvement to better align with market expectations: The project's attributes or measures more closely meets the guidance indicated at this level OR a significant proportion of its attributes do not meet the attributes that indicate alignment to best practice.
- Significant opportunities for improvement to align with market expectations: Project does not meet the requirements for a few or a significant number of the attributes in the next level.

The Project Guidelines provides a reference of sources and suggested analysis for each assessable criteria. An overview of the sources of reference for each criteria is provided in Table 1.

Table 1: Sources of reference for each assessment criteria

Criteria	PDD/PIN	Desktop research	Interviews
F1: Project ERC value	?	?	?
F2: Additional value enabled by project	?	?	?

Criteria	PDD/PIN	Desktop research	Interviews
Q1: MRV infrastructure	?	?	?
Q2: Marketing, sales and pricing	?	?	?
Q3: Project governance and structure	?	?	?
C1: Carbon integrity	?	?	?
C2: Environmental risk management	?	?	?
C3: Social risk management and benefits	?	?	?
S2: Socioeconomic value	?	?	?

Limitations

The project assessment does not include a full due diligence of the project, including its transaction and business activity legality. This is to focus on the objectives of the assessment exercise to determine the preliminary viability of the shortlisted ERC projects from the initial profiling stage, across financial, legal, and technical dimensions.

In line with this, a technical review of the project's carbon integrity is also not an aim of this exercise due to the subjective and complex nature of such a review that will require in-depth carbon accounting and methodology expertise, best conducted by authorized Validation and Verification Bodies. Instead, the assessment prioritizes a simplified approach that will enable the Government entity to understand a project's ability to meet the carbon integrity expectations of the market within a shorter time-frame and leveraging a reasonable level of technical capabilities given the carbon market's nascent nature.

Link to Assessment Templates

The project assessment templates in [Appendix B](#) includes a Summary with observations and scoring as well as Action points recommended for the project proponents. The Project Assessment Deep Dives includes 8 different components including Project ERC value, MRV infrastructure, Marketing, sales and pricing, Project

governance and structure, Carbon integrity, Environmental risk management, Social risk management and benefits and Socioeconomic value. Finally a template for Project information is provided.

Related Content

- [Innovative Revenues for Infrastructure \(Download PDF version\)](#)

Additional Resources

- [Climate-Smart PPPs](#)
- [Finance Structures for PPP](#)

This section is intended to be a living document and will be reviewed at regular intervals. The Guidelines have not been prepared with any specific transaction in mind and are meant to serve only as general guidance. It is therefore critical that the Guidelines be reviewed and adapted for specific transactions. Unless expressly stated otherwise, the findings, interpretations, and conclusions expressed in the Materials in this Site are those of the various authors of the Materials and are not necessarily those of The World Bank Group, its member institutions, or their respective Boards of Executive Directors or member countries. For [feedback](#) on the content of this section of the website or suggestions for links or materials that could be included, please contact the Public-Private Partnership Resource Center at ppp@worldbank.org.