



UNITED NATIONS
INDUSTRIAL DEVELOPMENT ORGANIZATION

FINANCING ECO-INDUSTRIAL PARKS

REPLICATING THE
UNIDO EIP ACCESS
TO FINANCE TOOL



GEIPP
GLOBAL ECO-INDUSTRIAL PARKS PROGRAMME

TABLE OF CONTENTS

03 • **About the Access to Finance Tool**

04 • **How to Replicate the Tool**

05 • **Stage 1: Data Collection**

06 • A Note on Data Integrity

07 • What Data needs to be collected?

09 • **Stage 2: Tool Creation**

10 • **Tab 1:** Instructions

14 • **Tab 2-3:** Database Setup

30 • **Tab 4:** Guidance on Accessing Finance

35 • **Tab 5:** Contact Financial Institutions Form

38 • **ANNEX 1: Data Collection Questionnaire**

ABOUT THE ACCESS TO FINANCE TOOL

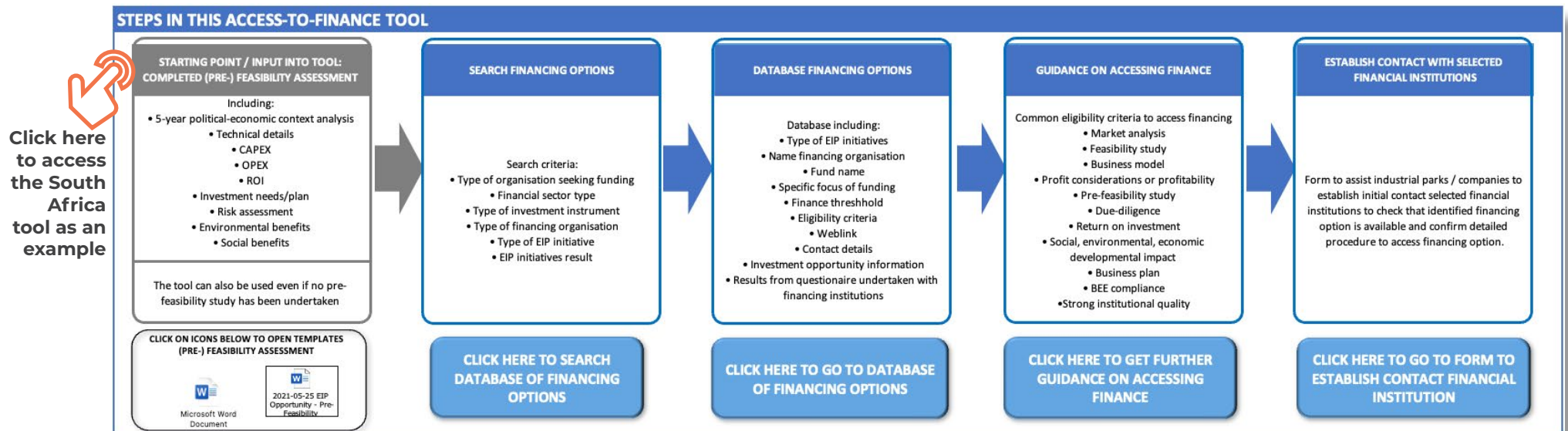
Tool Rationale

Access to finance is often a key challenge to implementing feasible initiatives in Eco-Industrial Parks (EIPs), whether at the level of park management entities or of tenant companies within the parks. Part of this challenge is the lack of information on what financing options are available in a way that can be easily accessed by private firms. To this end, the goal of the UNIDO EIP Access to Finance Tool is to guide park management entities and tenant companies to identify, review and access available financing options for feasible EIP initiatives for their industrial parks.

Tool Objectives

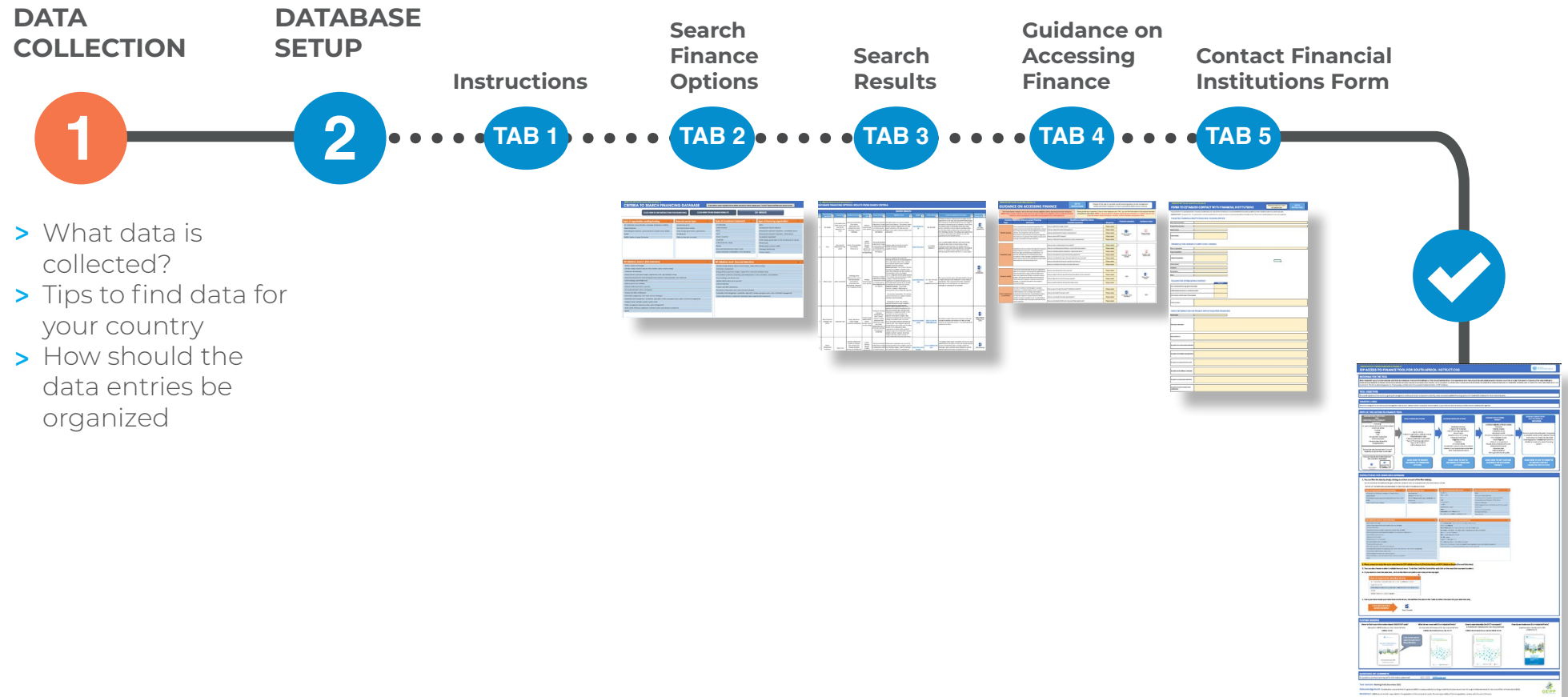
- Provide an overview of different types of financing mechanisms and their overall applicability to EIP initiatives
- Provide overall guidance on how to successfully access different types of financing options
- Facilitate exercises to identify available financing options nationally and internationally
- Direct park management and companies to relevant websites and contact details of identified financing options, in order to access detailed information and take next steps.

How to use the access to finance tool



HOW TO REPLICATE THE TOOL

The Access to Finance Tool is built on a carefully researched database of available funding options in specific country contexts. Once the data has been collected following an extensive mapping exercise, it is used to populate a database which exists in a standalone excel tool with a user-friendly interface. Replicating this tool requires a two-stage process.



STAGE 1: DATA COLLECTION

This section lays out the methodological considerations that need to be taken into account by the researcher as part of their work replicating the Access-to-Finance tool, in particular the data that underpins the tool database.



A NOTE ON DATA
INTEGRITY



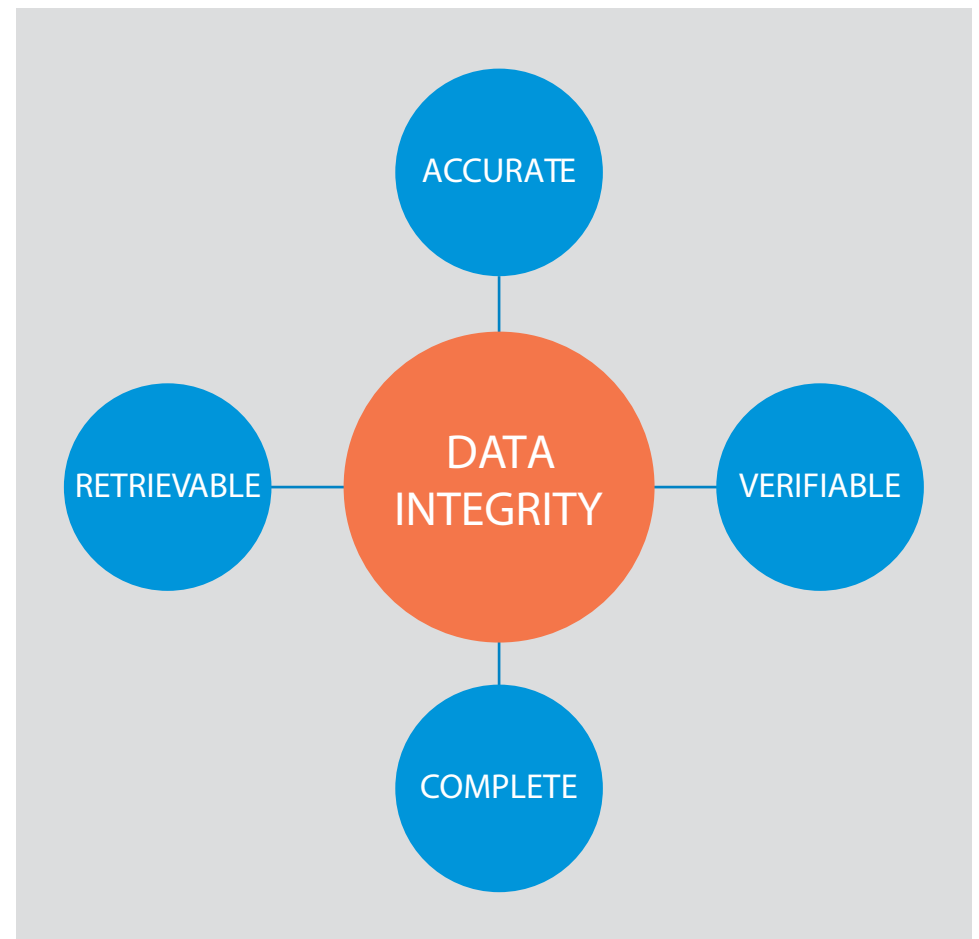
WHAT DATA NEEDS
TO BE COLLECTED?

A NOTE ON DATA INTEGRITY

The UNIDO EIP Access to Finance tool is intended to be an aid to decision-making when it comes to mobilising funding in support of an EIP initiative. It is therefore important that such decisions are based on the most complete and correct data possible.

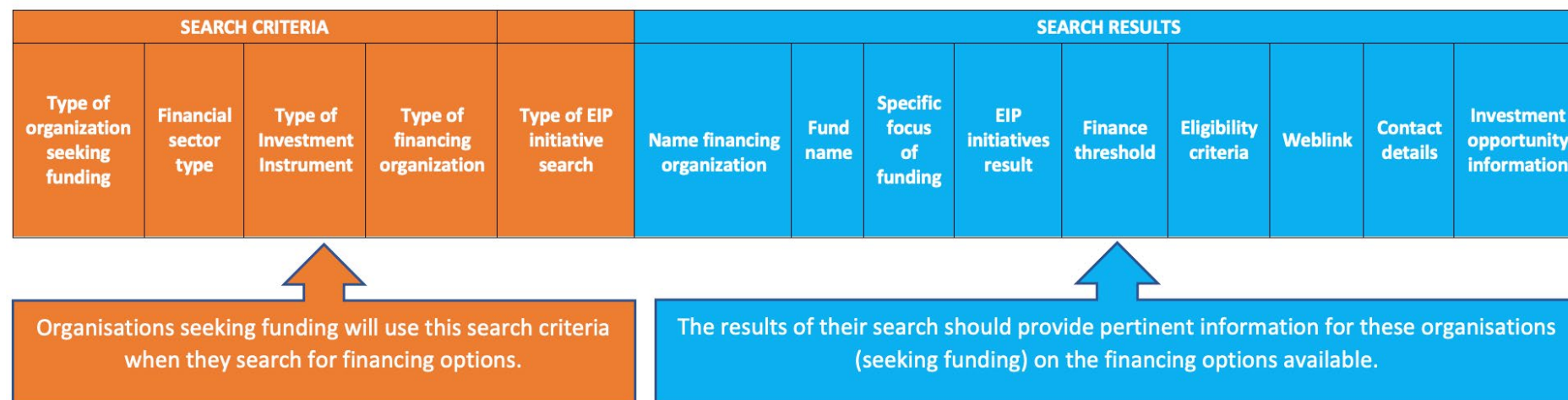
Data integrity therefore refers to the accuracy, consistency and completeness of the data stored in the database. The following principles should thus be kept in mind:

- **Data Integrity begins during the data collecting phase;**
- **Data integrity rules specify that the database contains the highest quality data from the highest quality sources;**
- **Precise data means that it is clearly expressed, definite, accurate, correct and conforming to proper form.**



WHAT DATA NEEDS TO BE COLLECTED?

When gathering information, the data should be based on both an understanding of the (i) search criteria and (ii) search results (see below).



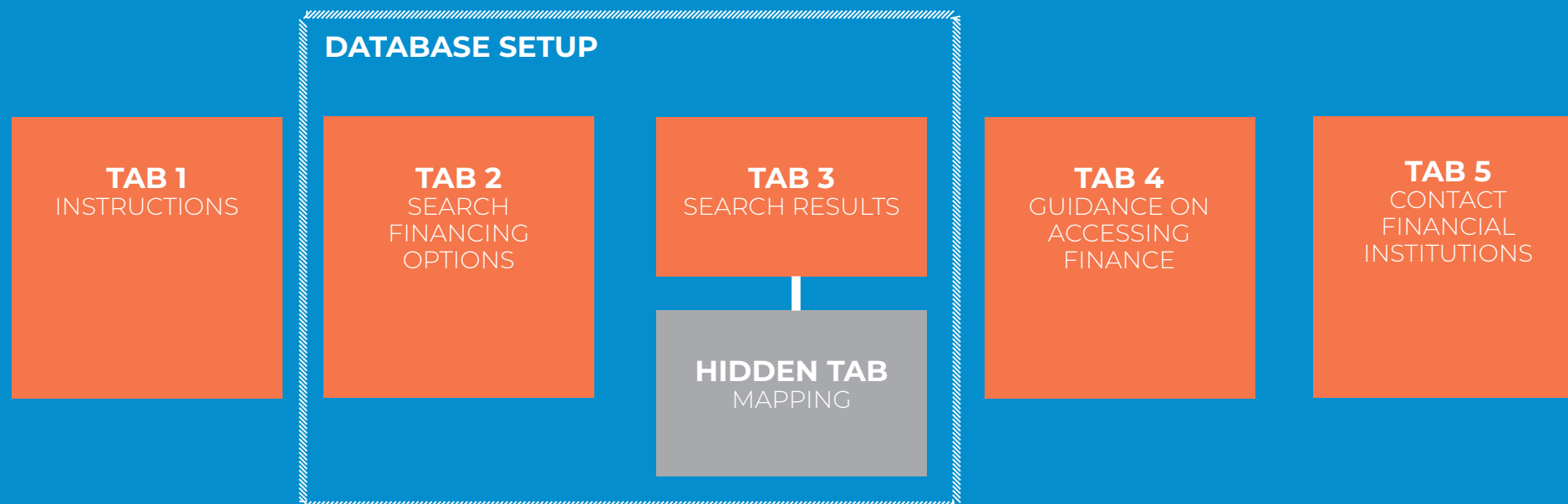
A data collection questionnaire is available in **Annex 1** and unpacks the components of each data column. Below is an example for the search criteria options.

Type of organization seeking funding	Financing Sector	Investment Instrument	Financing Institution type	Type of EIP initiative
All (large companies, SMMEs and Park Management)	Private Sector	Loan	Banks	Climate change adaptation
Large companies	Government Sector	Grant	Private Equity	Property and utility maintenance
SMEs	National donor funding	Equity	Venture Capital	Occupational health, safety and hygiene
Park Management	International donor funding	Rebate	Development finance institutions	Community development
Other	Public, Private, Community	Debt/Guarantee	Sovereign Wealth Funds	Carbon capture and storage
	Other (Foreign Governments, etc.)	Debt/Loan	Enterprise Development Program (Private Sector)	Energy efficiency (cogeneration, smart grid)
		Crowdfunding	Enterprise Development Program (Government Sector)	Environmental protection (pollution control, prevention and treatment)

Type of organization seeking funding	Financing Sector	Investment Instrument	Financing Institution type	Type of EIP initiative
		Impact Investment	Government Departments	Green buildings
		Social and Economic Impact Bond	Other	Green products and materials
		Various Instruments		Renewable energy (solar, wind, hydro etc.)
				Sustainable land management, (sustainable agriculture, forestry)
				Transport (urban rail/metro, electric, hybrid, roads)
				Waste management (recycling, waste management)
				Water (water efficiency, wastewater treatment)

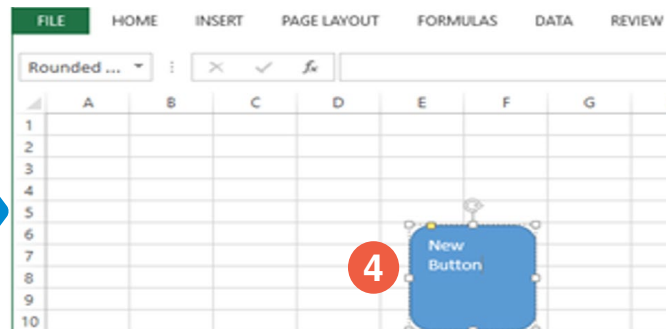
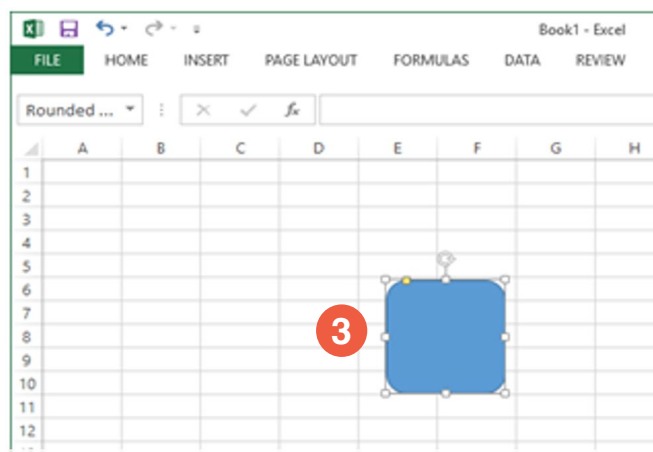
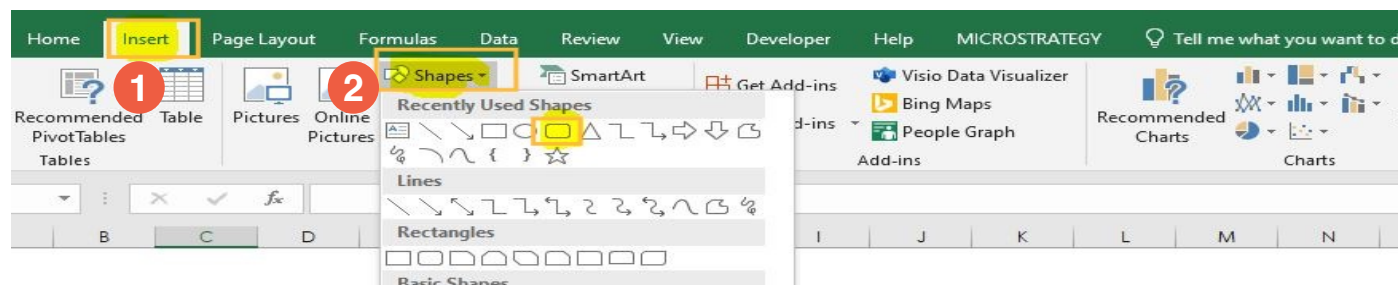
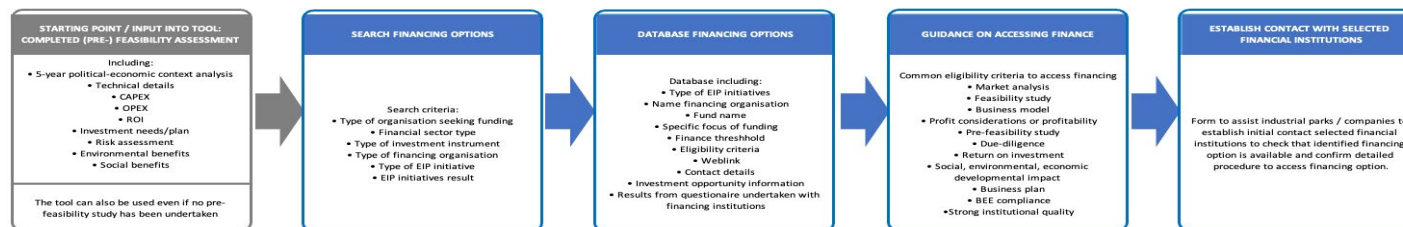
STAGE 2: CREATION OF TOOL INTERFACE AND DATABASE SETUP

This section contains instructions on how to set up and populate the database upon which the tool is built. It is organised by the different tabs of the tool.



TAB 1: INSTRUCTIONS

1.1. COMPONENTS



How to insert the tool flow chart

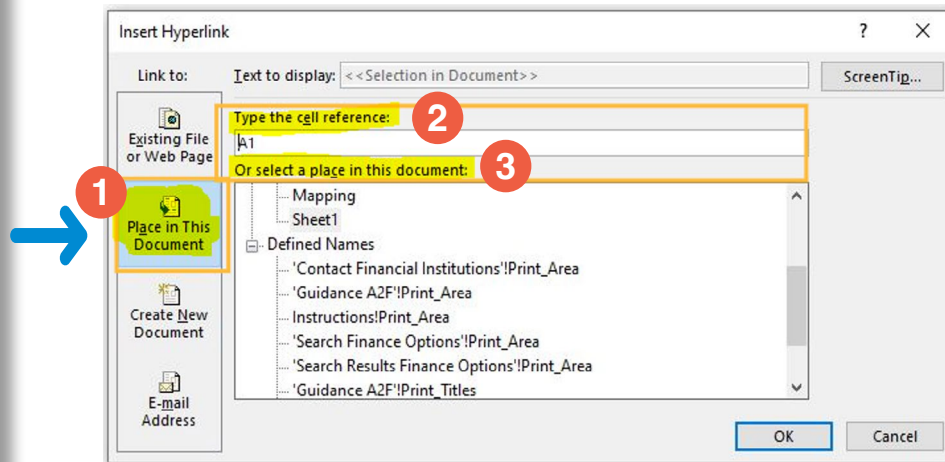
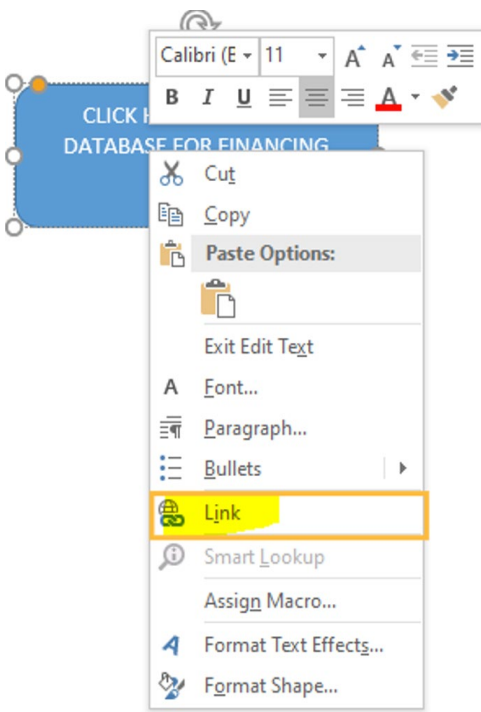
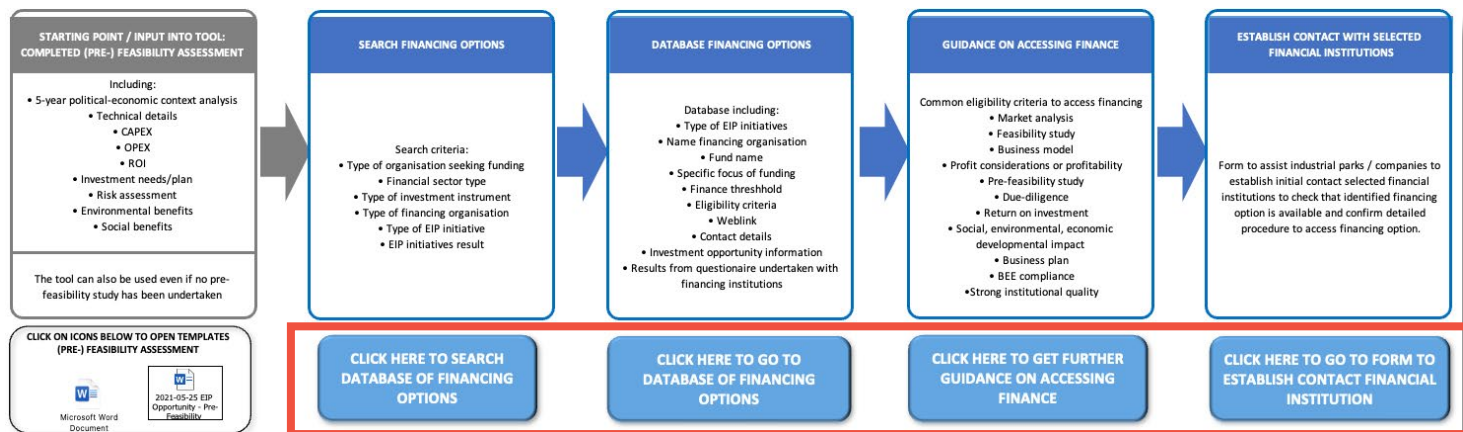
Illustration of the flow chart as it is displayed on the "Instructions" worksheet

Adding a shape

- 1 Access shape options from the Insert button on the excel main menu ribbon.
- 2 Go to the Shapes and click the drop-down arrow, and select the Rounded Rectangle icon
- 3 Draw a rounded rectangle in the cells on the worksheet.

Formatting a shape

- 4 To format the shape and add text, right-click and select edit text OR double-click the shape.
- Now add relevant text to the button



The buttons below the main boxes in the flow chart are created in the same way except that they have hyperlinks added.

Note: Before adding the hyperlinks, you must first add the text that you want to display in the box. To add the text, right click on the button and select "Edit text" option.

Adding a hyperlink

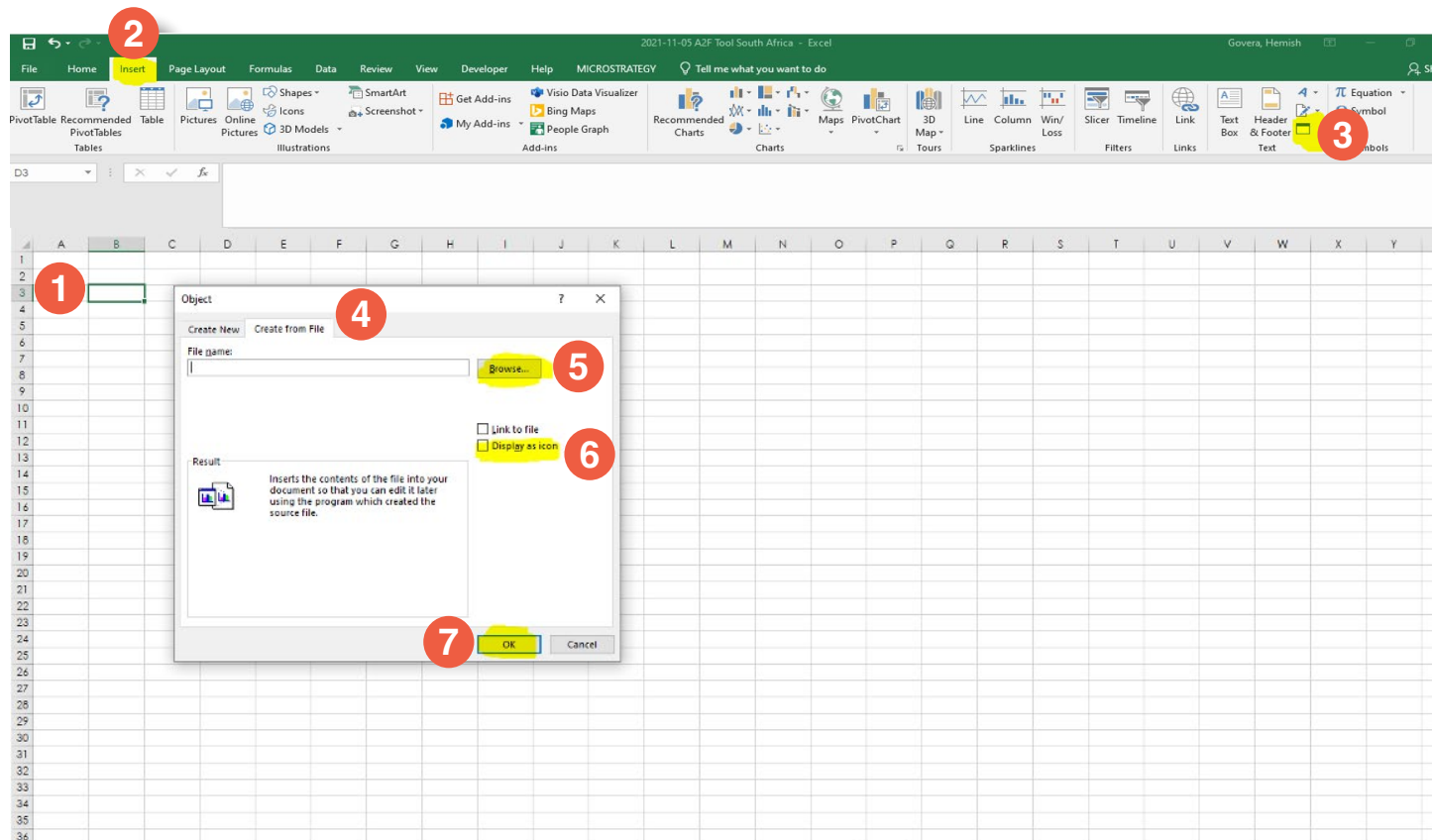
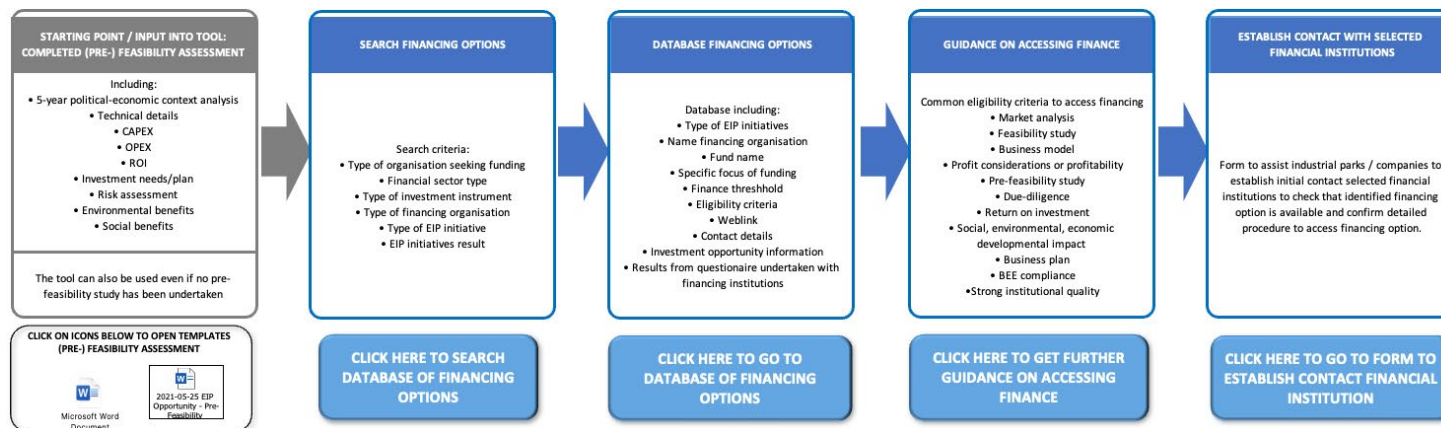
Once you have added the text, right click on the box to get the option to add hyperlink to the box. To Hyperlink a document, we suggest placing the document on one of the worksheets on the workbook. In general, the hyperlink can also work with website links.

1 Under the 'Link to' section, select 'Place in this Document'.

2 Under the 'Type the cell reference' section, type in the destination cell address.

3 Under the 'Or select a place in this document' click to choose the particular sheet name. Click the OK button when done

4 Now, when you click on the rounded rectangle, it will go to the specified cell of a specified sheet.



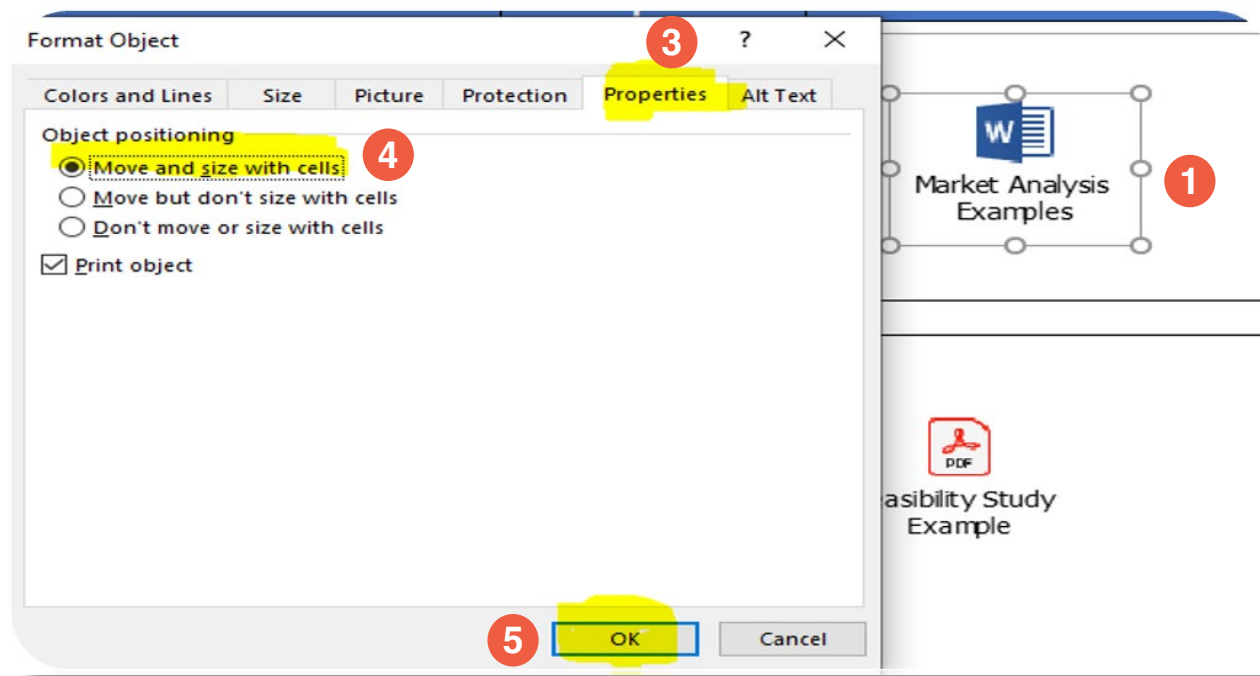
Adding feasibility assessment documents



There are 2 documents embedded onto the document, the feasibility and pre-feasibility study templates:

To insert files into the excel

1. Click inside the cell into which you want to insert the word/excel file.
2. Click on the 'Insert' tab
3. Click on the 'Object' under the 'Text' group
4. Select 'Create from File'
5. Browse your file
6. Select the 'Display as icon' check box if you want to insert an icon linking to the files.
7. Click on 'OK'



- 1 To fit the document into a cell, right click on the document.
- 2 Select 'Format Object'
- 3 Click on 'Properties'
- 4 Select 'Move and size with cells'
- 5 Click 'OK'

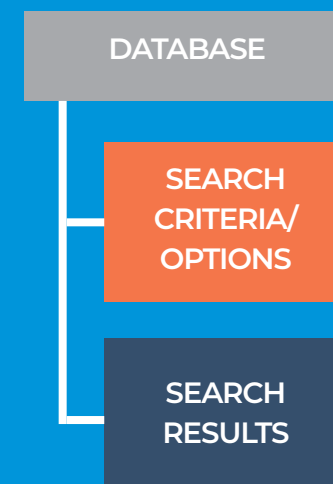
TAB 2-3: DATABASE SETUP

2.1 SEARCH CRITERIA OPTIONS

Type of organization seeking funding	Financing Sector	Investment Instrument	Financing Institution type	Type of EIP initiative
All (large companies, SMMEs and Park Management)	Private Sector	Loan	Banks	Climate change adaptation
Large companies	Government Sector	Grant	Private Equity	Property and utility maintenance
SMEs	National donor funding	Equity	Venture Capital	Occupational health, safety and hygiene
Park Management	International donor funding	Rebate	Development finance institutions	Community development
Other	Public, Private, Community	Debt/Guarantee	Sovereign Wealth Funds	Carbon capture and storage
	Other (Foreign Governments, etc.)	Debt/Loan	Enterprise Development Program (Private Sector)	Energy efficiency (cogeneration, smart grid)
		Crowdfunding	Enterprise Development Program (Government Sector)	Environmental protection (pollution control, prevention and treatment)
		Impact Investment	Government Departments	Green buildings
		Social and Economic Impact Bond	Other	Green products and materials
		Various Instruments		Renewable energy (solar, wind, hydro etc.)
				Sustainable land management, (sustainable agriculture, forestry)
				Transport (urban rail/metro, electric, hybrid, roads)
				Waste management (recycling, waste management)
				Water (water efficiency, wastewater treatment)

Database setup is based on the following two components

- Search criteria/options
- Search results



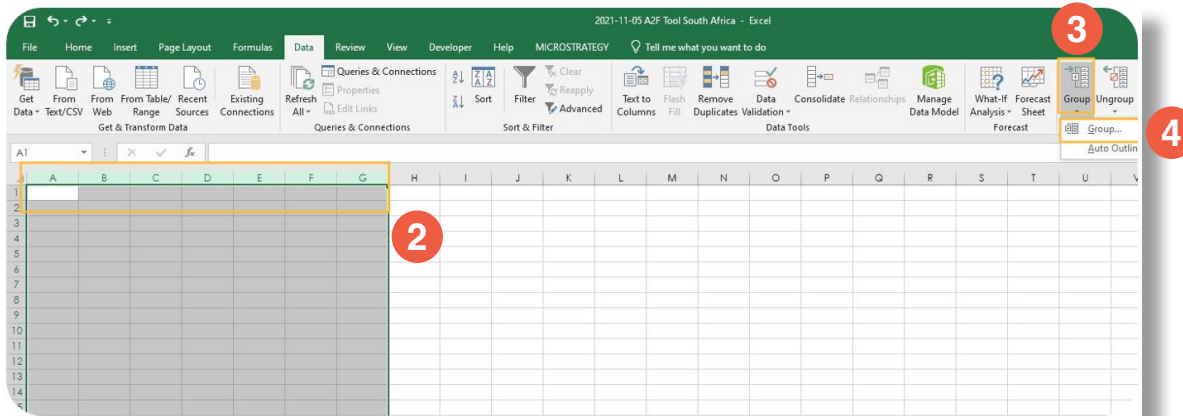
3.1 TABLE FIELDS

SEARCH CRITERIA					SEARCH RESULTS								
Type of organization seeking funding	Financial sector type	Type of Investment Instrument	Type of financing organization	Type of EIP initiative search	Name financing organization	Fund name	Specific focus of funding	EIP initiatives result	Finance threshold	Eligibility criteria	Weblink	Contact details	Investment opportunity information

DATABASE FINANCING OPTIONS: RESULTS FROM SEARCH CRITERIA													
SEARCH CRITERIA													
Type of organisation seeking funding	financial sector type	Type of Investment Instrument	type of financing organisation	Type of EIP initiatives search	Name financing organisation	Fund name	Specific focus of funding	EIP initiative result	Finance threshold	Eligibility criteria	Weblink	Contact details	Investment opportunity information

USER VIEW

3.2 ADDING THE SCROLL BAR



« To build a database, add the following fields on a separate worksheet.

« On the database, the search criteria is hidden by default using the hide or display scroll bar.

1 The scroll bar (circled in the illustration) can be toggled to either hide or display data as required. It expands and contracts the view when pressed.

2 To add the scroll, highlight the data columns you need to expand and contract using the button.

3 Select "Group" from the "Outline" option.

4 Select "Group" from the popup menu.

1								
2								
	A	B	C	D	E	F	G	H
1								
2								
3								
4								
5								
6								

1

1

This creates the scroll button which can be toggled to either expand or contract the data selection as illustrated.



Data entries are added to the database from the "Search Results Finance Options" tab. The tab contains the raw data in columns A-P

3.3 ADDING DATA ENTRIES

SEARCH CRITERIA						SEARCH RESULTS							
Type of organisation seeking funding	Financial sector type	Type of investment instrument	Type of financing organisation	Type of EP initiatives search	Name financing organisation	Fund name	Specific focus of funding	EP initiatives result	Finance threshold	Eligibility criteria	Website	Contact details	Investment opportunity information
SMEs	Private sector	Equity	Venture Capital	Multiple initiatives (non-sector specific)	400 Capital	(1) 400 Capital Fund I (2) 400 Capital Fund II (3) The 400 Exponential Tech Fund I	Enterprise web platform, Cloud scaling infrastructure, Bio-mathematical health technology, Financial technology	Multiple initiatives (non-sector specific)	The finance threshold is determined through an assessment based on market analysis, value proposition and due diligence	400 Capital invests on a case by case basis based on due diligence. The company targets startup investment opportunities with high growth potential at the seed- and early stages in the mobile, enterprise software and web sectors.	www.400capital.com/	022 658 3000	400 Capital specialises in high-growth technology venture opportunities, at the seed, early- and growth-funding stages. The company was launched during the very early stages of the nascent and growing start-up ecosystem in South Africa. The company seeks to fund founder teams with hungry passion, commitment, domain expertise and deep insights into the large market problems they wish to solve with their technology solutions. The company gives opportunities particularly to businesses with ambitions to scale their operations into international markets.
SMEs, Medium & Large Companies	Private Sector	Equity	Private Equity	Environmental protection (monitoring (park-level) pollution control, prevention, and treatment), Green buildings, park infrastructure, Renewable energy (solar, wind, hydro biomass, hydrogen), Energy efficiency (process changes, cogeneration, smart grid, heating/cooling), Transport (urban rail, metro, electric, hybrid, roads)	Actis	Actis Long Life Infrastructure Fund (ALLIF)	Energy, Green buildings, Environment, Infrastructure	Energy efficiency (process changes, cogeneration, smart grid, heating/cooling)	The finance threshold is determined through an assessment based on market analysis, value proposition and due diligence	Company makes investments in growth markets that deliver consistent and competitive returns	https://www.actis.io/	011 7705300 info@actis.io	Actis is a global platform offering a multi-asset strategy through the asset classes of private equity, energy, infrastructure and real estate. The company invests in aggregate energy assets targeting attractive risk-adjusted returns. The company focuses in high-growth monopoly distribution platforms where electricity is in scarce supply.

USER VIEW

SEARCH CRITERIA											SEARCH RESULTS	
	Type of organisation seeking funding	financial sector type	Type of Investment Instrument	type of financing organisation	Type of EIP initiatives search	Name financing organisation	Fund name	Specific focus of funding	EIP initiative result	Finance threshold	Eligibility criteria	
230	SMMEs	Other (Foreign governments, supranational lenders, foreign lenders)	Grant	Development Finance Institutions	Renewable energy (solar, wind, hydro biomass hydrogen)	UNCDF	United Nations Capital Development Fund (Unodf)	Solar, Small Hydropower, Hybrid	Other EIP Initiatives	100,000 - 500,000 EUR	Eligibility criteria Has to be incorporated Should be a legally registered entity in the target country/region Should be serving consumers living below the poverty line	
231	SMMEs	International donor funding	Grant	Enterprise Development Programme - Private Sector	Renewable energy (solar, wind, hydro biomass hydrogen)	The Clean Cooking Alliance	Venture Catalyst (Clean Cooking Alliance)	Clean energy	Other EIP Initiatives	0 - 100,000 EUR	Eligibility criteria Has to be incorporated	

1

1 To add data entries, navigate to the last row entry and enter a new row with the new information.

Once all the data entries have been captured. There is a need to ensure that the data is formatted as a table which will allow for data filters to be inserted.

MICROSTRATEGY												
Tell me what you want to do												
Equity												
#	Type of organisation seeking funding	financial sector type	Type of Investment Instrument	type of financing organisation	Type of EIP initiatives search	Name financing organisation	Fund name	Specific focus of funding	EIP Initiatives result	Finance threshold	Eligibility criteria	Weblink
1	SMMEs	Private sector	Equity	Venture Capital	Multiple Initiatives (non-sector specific)	4Di Capital	(1) 4Di Capital Fund I (2) 4Di Capital Fund II (3) The 4Di Exponential Tech Fund I	Enterprise web platform, Cloud scaling infrastructure, Bio-mathematical health technology, Financial technology	Other EIP Initiatives	The finance threshold is determined through an assessment based on market analysis, value proposition and due diligence	4Di Capital invests on a case by case basis based on due diligence. The company targets startup investment opportunities with high growth potential at the seed- and early- stages in the mobile, enterprise software and web sectors.	www.4di-capital.com/
2					Environmental protection (monitoring (park-level) pollution control, prevention, and treatment), Gre							

3

To format the data as a table

2 Click anywhere inside the raw data

3 Select "Format as Table" from the "Home" option on the excel ribbon.

3.4 SETTING UP THE DATABASE MAPPING

Name Of Financing Organization	EIP Initiatives Search
--------------------------------	------------------------

1

C	D
Name Of Financing Organisation	EIP Initiatives Search
4Di Capital	Multiple initiatives (non-sector specific)
Actis	Environmental protection (monitoring (park-level) pollution control, prevention, and treatment)
Actis	Green buildings, park infrastructure
Actis	Renewable energy (solar, wind, hydro biomass hydrogen)
Actis	Energy efficiency (process changes, cogeneration, smart grid, heating/cooling)
Adlevo Capital	Multiple initiatives (non-sector specific)
Africa Enterprise Challenge Fund (AECF)	Climate change adaption (flood control channels, dykes, natural cooling)
Africa Enterprise Challenge Fund (AECF)	Green products and materials
Africa Enterprise Challenge Fund (AECF)	Sustainable land management, (sustainable agriculture, forestry, park green areas, water catchment management)
Africa Enterprise Challenge Fund (AECF)	Renewable energy (solar, wind, hydro biomass hydrogen)

H	I
Name Of Financing Organisation	EIP Initiatives Search
4Di Capital	Multiple initiatives (non-sector specific)
Actis	Energy efficiency (process changes, cogeneration, smart grid, heating/cooling)
Actis	Environmental protection (monitoring (park-level) pollution control, prevention, and treatment)
Actis	Green buildings, park infrastructure
Actis	Renewable energy (solar, wind, hydro biomass hydrogen)
Actis	Transport (urban rail/metro, electric, hybrid, roads)
Adlevo Capital	Multiple initiatives (non-sector specific)
Africa Enterprise Challenge Fund (AECF)	Climate change adaption (flood control channels, dykes, natural cooling)
Africa Enterprise Challenge Fund (AECF)	Green products and materials
Africa Enterprise Challenge Fund (AECF)	Renewable energy (solar, wind, hydro biomass hydrogen)
Africa Enterprise Challenge Fund (AECF)	Sustainable land management, (sustainable agriculture, forestry, park green areas, water catchment management)
Africa Enterprise Challenge Fund (AECF)	Multiple initiatives (non-sector specific)

3 USER VIEW

The new data entries need to be added to a Mapping tab which is hidden by default. This needs to be created on a new worksheet in the Excel workbook.

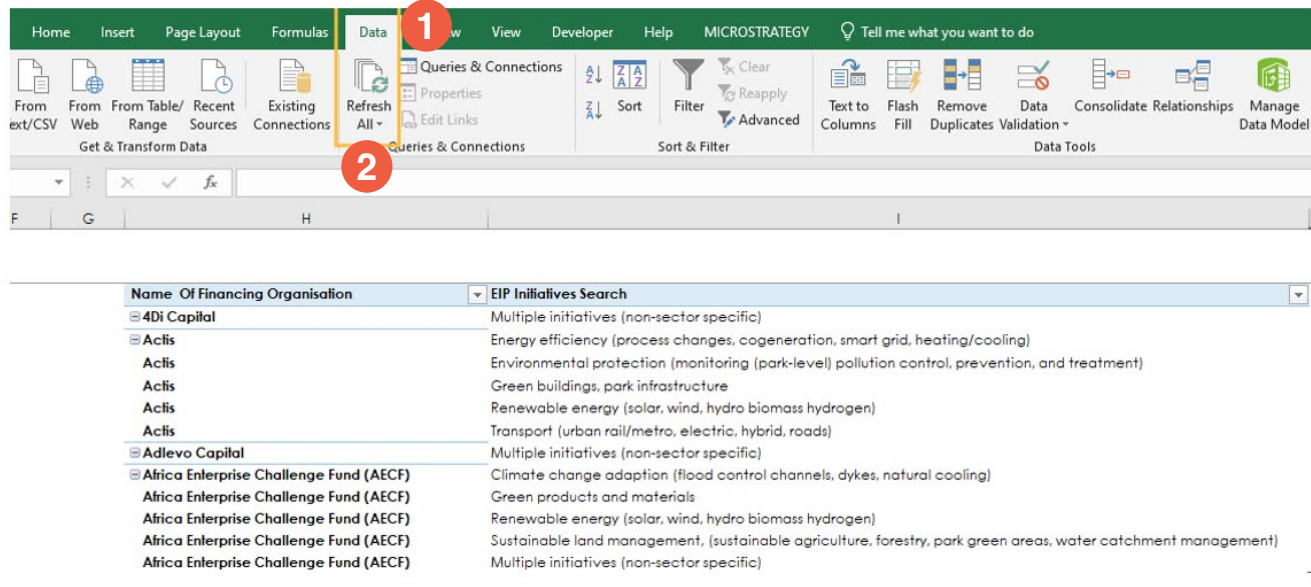
1 There are two main fields in the mapping section.

For each new data entry into the database, the name of the financing organization and the list of associated EIP initiatives needs to be added to the mapping tab.

2 These two fields are located on columns C-D.

In the screenshot to the left, all the 4 EIP entries for Africa Enterprise Challenge Fund (AECF) are entered individually against the company's name one after the other.

3 Once the data has been entered on Columns C-D of the mapping tab as per the above instructions, the pivot in columns H-I need to be refreshed to update the new information (see USER VIEW for the result).



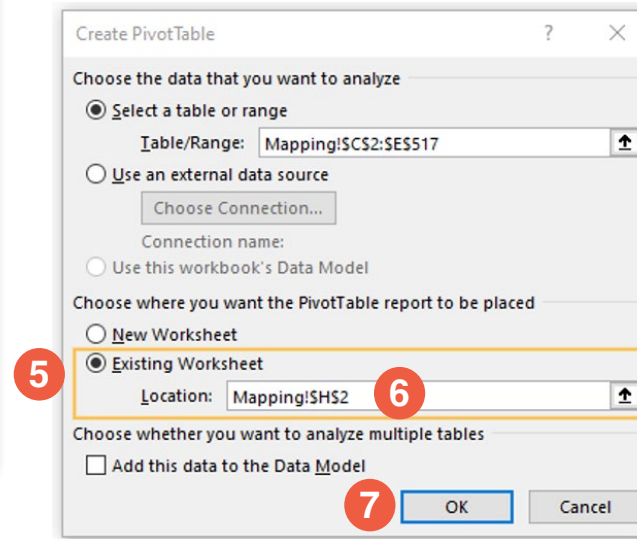
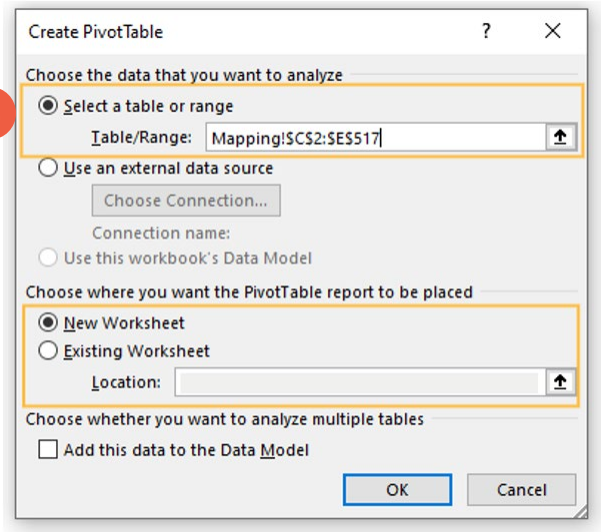
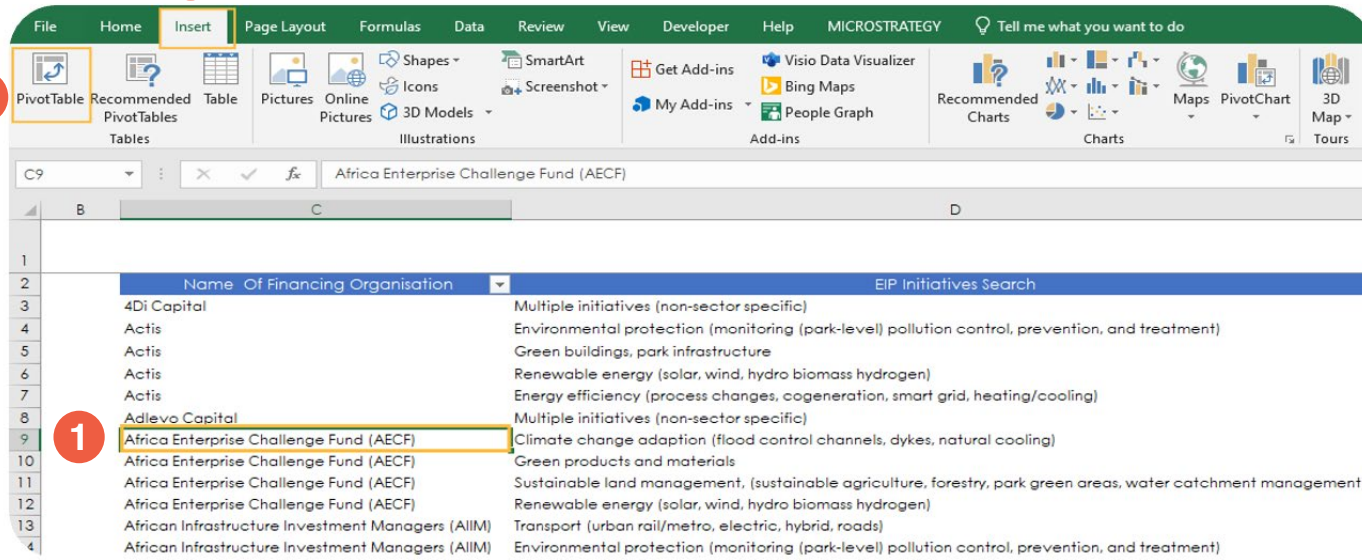
Refresh Pivot Table

- 1 Navigate to the **Data** tab on the ribbon
- 2 Click on **Refresh All**

EIP Initiatives Search (First Selection)	EIP initiatives result (Second Selection)
Carbon capture and storage	Climate change adaption (flood control channels, dykes, natural cooling)
Climate change adaption (flood control channels, dykes, natural cooling)	Community development
Community development	Energy efficiency (process changes, cogeneration, smart grid, heating/cooling)
Energy efficiency (process changes, cogeneration, smart grid, heating/cooling)	Environmental protection (monitoring (park-level) pollution control, prevention, and treatment)
Environmental protection (monitoring (park-level) pollution control, prevention, and treatment)	Green buildings, park infrastructure
Green buildings, park infrastructure	Multiple initiatives (non-sector specific)
Green products and materials	Other EIP initiatives
Multiple initiatives (non-sector specific)	Property and utility maintenance
Occupational health, safety, and hygiene	Renewable energy (solar, wind, hydro biomass hydrogen)
Property and utility maintenance	Sustainable land management, (sustainable agriculture, forestry, park green areas, water catchment management)
Renewable energy (solar, wind, hydro biomass hydrogen)	Water (water efficiency, wastewater treatment) water reuse networks at park level
Sustainable land management, (sustainable agriculture, forestry, park green areas, water catchment management)	
Transport (urban rail/metro, electric, hybrid, roads)	
Waste management (reuse/recycling, waste management)	
Water (water efficiency, wastewater treatment) water reuse networks at park level	
(blank)	

USER VIEW

« The information from the pivot feeds the "EIP Initiatives Result (Second Selection)" slicer that is on the "Search Finance Solutions" tab



SETTING UP THE PIVOT TABLE



The pivot table is based on the data entries in columns C-D of the mapping tab

To insert the pivot table



Click any cell within the data entries in columns C-D



Navigate to the **Insert** tab in the ribbon



Select the **Pivot Table** from the **Tables** options on the tab

In the popup menu



Leave the data range as pre-selected and choose where you would like to place the pivot table, either on a new worksheet or in an existing worksheet.



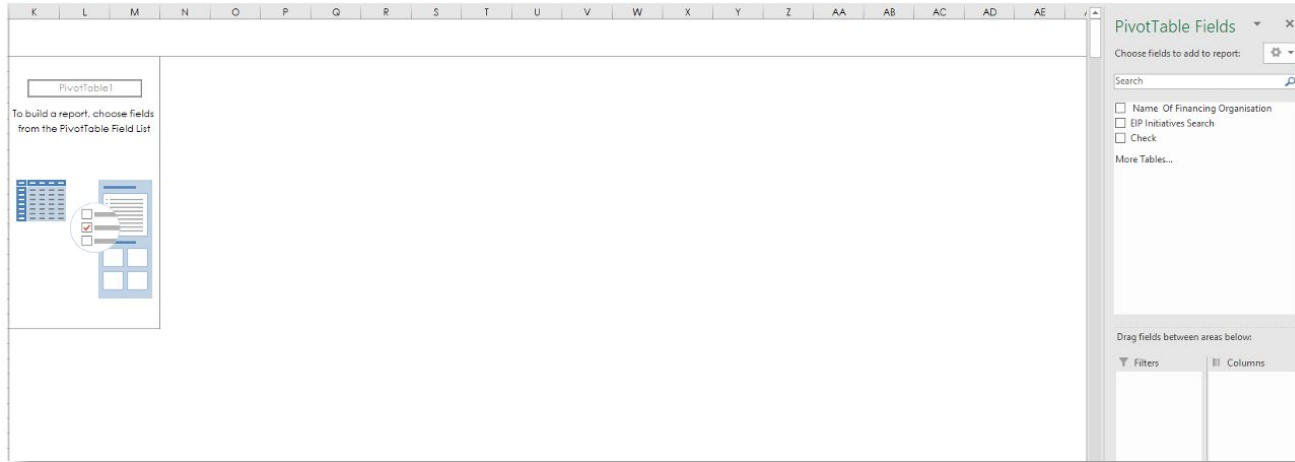
If you select existing worksheet, then you need to click on the location where you want it placed.



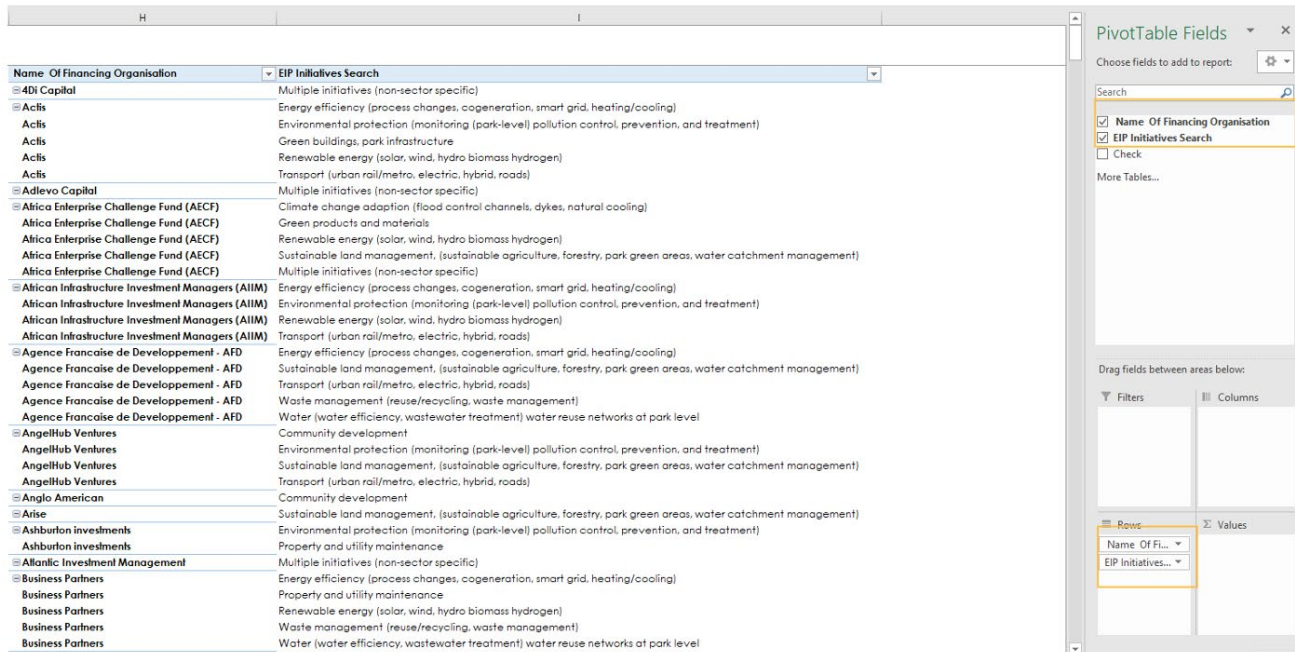
Clicking in Cell H2 in this case populates the location.



Click on OK and the pivot table frame and fields populate (see screenshot on next page).



1 Drag the "Name of the financing organization" and "EIP Initiatives Search" data fields into the rows area of the fields.



Result when data is formatted correctly with the pivot table.

The screenshot shows the Microsoft Excel interface with the 'Design' tab selected. The 'Report Layout' dropdown menu is open, displaying options for how to display the PivotTable data. The 'Show in Tabular Form' option is highlighted with a red circle '4'. A red circle '1' points to a cell in the data table, and a red circle '2' points to the 'Design' tab. A red circle '3' points to the 'Report Layout' dropdown. A red circle '4' points to the 'Show in Tabular Form' option.

Filter	Initiative
Actis	Multiple initiatives (non-sector specific)
Actis	Energy efficiency (process changes, cogeneration, smart grid, heating/cooling)
Adlevo Capital	Environmental protection (monitoring (park-level) pollution control, prevention, and treatment)
Africa Enterprise Challenge Fund (AECF)	Green buildings, park infrastructure
Africa Enterprise Challenge Fund (AECF)	Renewable energy (solar, wind, hydro biomass hydrogen)
Africa Enterprise Challenge Fund (AECF)	Transport (urban rail/metro, electric, hybrid, roads)
Africa Enterprise Challenge Fund (AECF)	Multiple initiatives (non-sector specific)
Africa Enterprise Challenge Fund (AECF)	Climate change adaption (flood control channels, dykes, natural coolina)
Africa Enterprise Challenge Fund (AECF)	Green products and materials
African Infrastructure Investment Managers (AIIM)	Renewable energy (solar, wind, hydro biomass hydrogen)
African Infrastructure Investment Managers (AIIM)	Sustainable land management, (sustainable agriculture, forestry, park green areas, water catchment management)
African Infrastructure Investment Managers (AIIM)	Multiple initiatives (non-sector specific)
African Infrastructure Investment Managers (AIIM)	Energy efficiency (process changes, cogeneration, smart grid, heating/cooling)
African Infrastructure Investment Managers (AIIM)	Environmental protection (monitoring (park-level) pollution control, prevention, and treatment)
African Infrastructure Investment Managers (AIIM)	Renewable energy (solar, wind, hydro biomass hydrogen)
African Infrastructure Investment Managers (AIIM)	Transport (urban rail/metro, electric, hybrid, roads)
Agence Francaise de Developpement - AFD	Energy efficiency (process changes, cogeneration, smart grid, heating/cooling)
Agence Francaise de Developpement - AFD	Sustainable land management, (sustainable agriculture, forestry, park green areas, water catchment management)
Agence Francaise de Developpement - AFD	Transport (urban rail/metro, electric, hybrid, roads)
Agence Francaise de Developpement - AFD	Waste management (reuse/recycling, waste management)
Agence Francaise de Developpement - AFD	Water (water efficiency, wastewater treatment) water reuse networks at park level

TROUBLESHOOTING

- « If for some reason, the final data is not formatted side by side like in the table on the previous page
- 1 Click any cell inside the pivot
 - 2 Navigate to the **Design** tab under **PivotTableStyles**
 - 3 Click on **Report Layout**
 - 4 Select **Show in a Tabular Form**

2

3

1

4

5

Name Of Financing Organisation	EIP Initiatives Search
4Di Capital	Multiple initiatives (non-sector specific)
Actis	Energy efficiency (process changes, cogeneration, smart grid, heating/cooling)
Actis	Environmental protection (monitoring (park-level) pollution control, prevention, and treatment)
Actis	Green buildings, park infrastructure
Actis	Renewable energy (solar, wind, hydro biomass hydrogen)
Actis	Transport (urban rail/metro, electric, hybrid, roads)
Adlevo Capital	Multiple initiatives (non-sector specific)
Africa Enterprise Challenge Fund (AECF)	Climate change adaption (flood control channels, dykes, natural cooling)
Africa Enterprise Challenge Fund (AECF)	Green products and materials
Africa Enterprise Challenge Fund (AECF)	Renewable energy (solar, wind, hydro biomass hydrogen)
Africa Enterprise Challenge Fund (AECF)	Sustainable land management, (sustainable agriculture, forestry, park green areas, water catchment)
Africa Enterprise Challenge Fund (AECF)	Multiple initiatives (non-sector specific)
African Infrastructure Investment Managers (AIIM)	Energy efficiency (process changes, cogeneration, smart grid, heating/cooling)
African Infrastructure Investment Managers (AIIM)	Environmental protection (monitoring (park-level) pollution control, prevention, and treatment)
African Infrastructure Investment Managers (AIIM)	Renewable energy (solar, wind, hydro biomass hydrogen)
African Infrastructure Investment Managers (AIIM)	Transport (urban rail/metro, electric, hybrid, roads)
Agence Francaise de Developpement - AFD	Energy efficiency (process changes, cogeneration, smart grid, heating/cooling)
Agence Francaise de Developpement - AFD	Sustainable land management, (sustainable agriculture, forestry, park green areas, water catchment management)
Agence Francaise de Developpement - AFD	Transport (urban rail/metro, electric, hybrid, roads)
Agence Francaise de Developpement - AFD	Waste management (reuse/recycling, waste management)
Agence Francaise de Developpement - AFD	Water (water efficiency, wastewater treatment) water reuse networks at park level

INSERTING THE SLICER FOR THE PIVOT TABLE

- « To insert the slicer for the EIP Initiatives Search:
- 1 Click any cell in the pivot
 - 2 Select the **Analyze** option in the ribbon
 - 3 Click on **Insert Slicer** and the slicer option box will pop up
 - 4 Click on the "EIP Initiatives Search" option
 - 5 Click **OK**

«

Once you click OK, the slicer will populate the information.

Cut and paste the slicer and place it alongside the other slicers in the **Search Finance Options** tab

Name Of Financing Organisation	EIP Initiatives Search
4Di Capital	Multiple initiatives (non-sector specific)
Actis	Energy efficiency (process changes, cogeneration, smart grid, heating/cooling)
Actis	Environmental protection (monitoring (park-level) pollution control, prevention, and treatment)
Actis	Green buildings, park infrastructure
Actis	Renewable energy (solar, wind, hydro biomass hydrogen)
Actis	Transport (urban rail/metro, electric, hybrid, roads)
Adlevo Capital	Multiple initiatives (non-sector specific)
Africa Enterprise Challenge Fund (AECF)	Climate change adaption (flood control channels, dykes, natural cooling)
Africa Enterprise Challenge Fund (AECF)	Green products and materials
Africa Enterprise Challenge Fund (AECF)	Renewable energy (solar, wind, hydro biomass hydrogen)
Africa Enterprise Challenge Fund (AECF)	Sustainable land management, (sustainable agriculture, forestry, park green areas, water catchment management)
Africa Enterprise Challenge Fund (AECF)	Multiple initiatives (non-sector specific)
African Infrastructure Investment Managers (AIIM)	Energy efficiency (process changes, cogeneration, smart grid, heating/cooling)
African Infrastructure Investment Managers (AIIM)	Environmental protection (monitoring (park-level) pollution control, prevention, and treatment)
African Infrastructure Investment Managers (AIIM)	Renewable energy (solar, wind, hydro biomass hydrogen)
African Infrastructure Investment Managers (AIIM)	Transport (urban rail/metro, electric, hybrid, roads)
Agence Francaise de Developpement - AFD	Energy efficiency (process changes, cogeneration, smart grid, heating/cooling)
Agence Francaise de Developpement - AFD	Sustainable land management, (sustainable agriculture, forestry, park green areas, water catchment management)
Agence Francaise de Developpement - AFD	Transport (urban rail/metro, electric, hybrid, roads)
Agence Francaise de Developpement - AFD	Waste management (reuse/recycling, waste management)
Agence Francaise de Developpement - AFD	Water (water efficiency, wastewater treatment) water reuse networks at park level
AngelHub Ventures	Community development
AngelHub Ventures	Environmental protection (monitoring (park-level) pollution control, prevention, and treatment)
AngelHub Ventures	Sustainable land management, (sustainable agriculture, forestry, park green areas, water catchment management)
AngelHub Ventures	Transport (urban rail/metro, electric, hybrid, roads)
Anglo American	Community development

A box with slicer options will pop up (see next page).

ADD EIP A2F Tool for South Africa (DRAFT)

DATABASE FINANCING OPTIONS: RESULTS FROM SEARCH CRITERIA

231 RESULTS

CLICK HERE TO GO BACK TO SEARCH CRITERIA

SEARCH CRITERIA						SEARCH RESULTS		
Type of organisation seeking funding	financial sector type	Type of Investment Instrument	type of financing organisation	Type of EIP initiatives search	Name financing organisation	Contact details	Investment opportunity	
1	SMMEs	Private sector	Equity	Venture Capital	Multiple initiatives (non-sector specific)	ADI Capital	021 659 2000	ADI Capital provides opportunities, stages, The co stages of the n South Africa. T with funding pat deep insights i solve with their opportunities s scale their ope
2	SMMEs, Medium & Large Companies	Private Sector	Equity	Private Equity	Environmental protection (monitoring (park-level) pollution control, prevention, and treatment), Green buildings, park infrastructure, Renewable energy (solar, wind, hydro, biomass, hydrogen), Energy efficiency (process changes, cogeneration, smart grid, heating/cooling), Transport (urban rail/metro, electric, hybrid, road/rail)	Actis	011 775 5900 info@actis.io	Actis is a glob through the as infrastructure e aggregate ener returns. The oc distribution pla
3	SMMEs	Private Sector	Equity	Private Equity	Multiple initiatives (non-sector specific)	Adveo Capital	Tel: +231 1454 1218 Email: info@adveocapital.co.za	The company's investments in various stages their competit exploitation of

Insert Slicers

☒ #
☐ Type of organisation seeking funding
☐ financial sector type
☐ Type of Investment Instrument
☐ type of financing organisation
☐ Type of EIP initiatives search
☐ Name financing organisation
☐ Fund name
☐ Specific focus of funding
☐ EIP initiatives result
☐ Finance threshold
☐ Eligibility criteria
☐ Weblink
☐ Contact details
☐ Investment opportunity information
☐ Questionnaire with financing institution

OKCancel

« To the left, the box with slicer options. The options are based on the table headings.

ADD EIP A2F Tool for South Africa (DRAFT)

DATABASE FINANCING OPTIONS: RESULTS FROM SEARCH CRITERIA

SEARCH CRITERIA				
Type of organisation seeking funding	financial sector type	Type of Investment Instrument	type of financing organisation	
1	SMMEs	Private sector	Equity	Venture Capital
2	SMMEs, Medium & Large Companies	Private Sector	Equity	Private Equity
3	SMMEs	Private Sector	Equity	Private Equity

1

#

☒ Type of organisation seeking funding

☒ financial sector type

☒ Type of Investment Instrument

☒ type of financing organisation

☒ Type of EIP initiatives search

☐ Name financing organisation

☐ Fund name

☐ Specific focus of funding

☐ EIP initiatives result

☐ Finance threshold

☐ Eligibility criteria

☐ Weblink

☐ Contact details

☐ Investment opportunity information

☐ Questionnaire with financing institution

2

OK

Cancel

1 This is the slicer selection for the Access-to-Finance database.

2 Click on the "OK" button and the slicers tables will populate

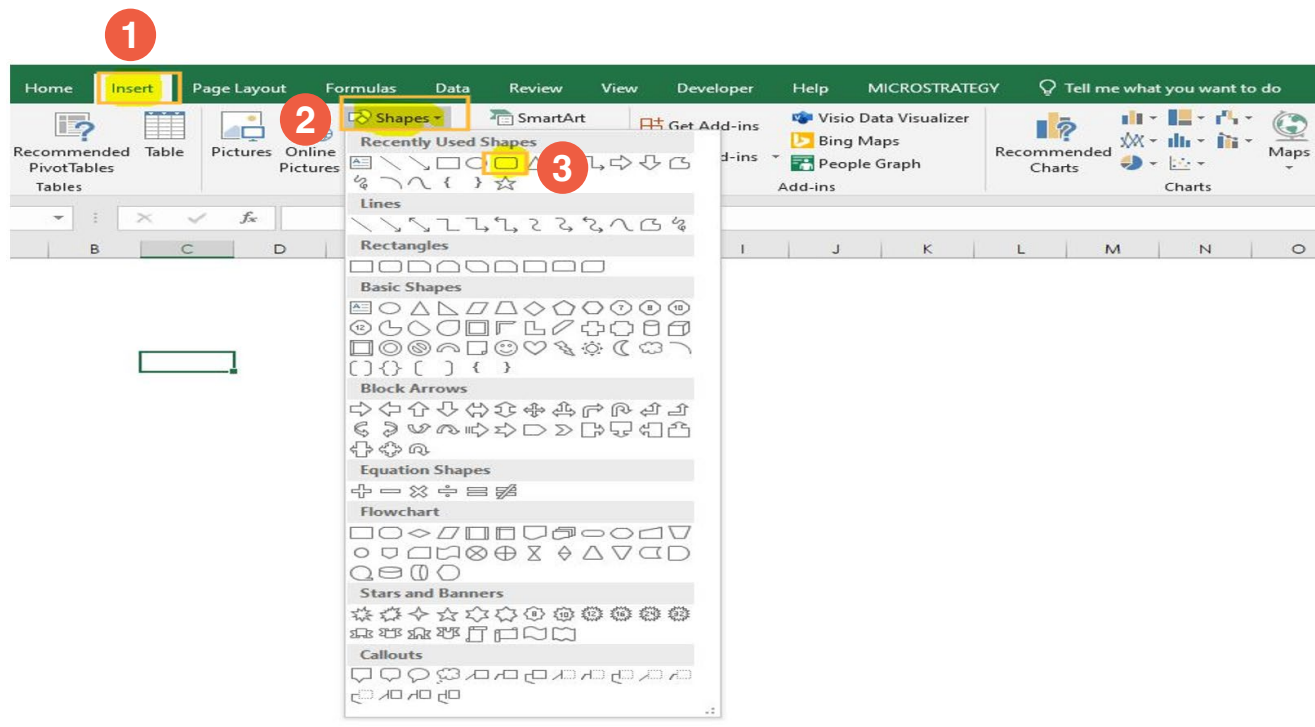
See next page for how this looks.

- 1 Cut and paste the slicers to the dedicated worksheet (Search Results Finance Options tab for this tool)
- 2 To select and cut the slicers, press **control** on your keyboard and select the individual slicer tables.
- 3 Once all slicer tables are selected, right-click, cut and paste in the desired tab.

3.6 SETTING UP THE BUTTONS FOR SEARCH FINANCING DATABASE



USER VIEW



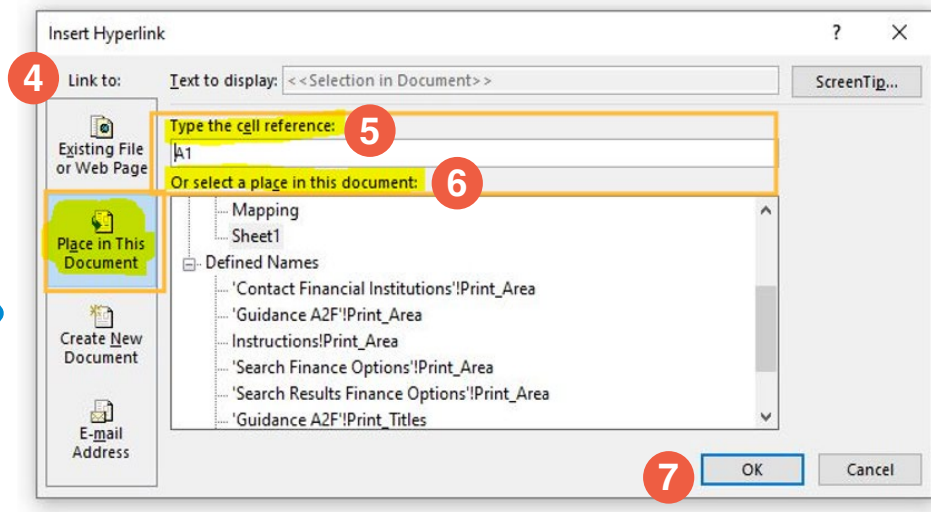
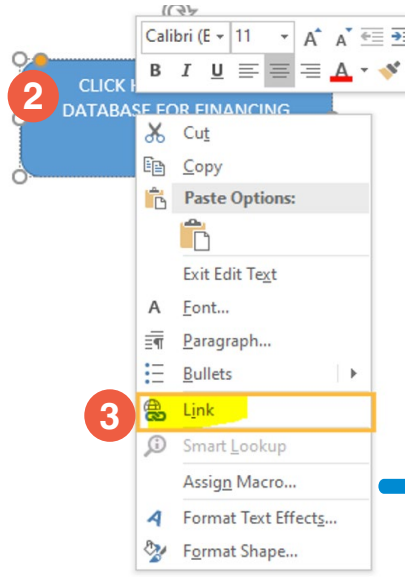
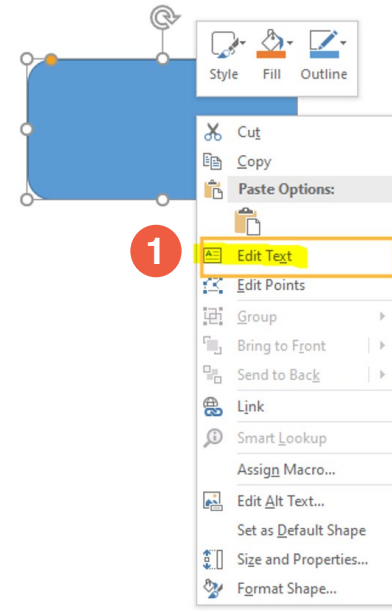
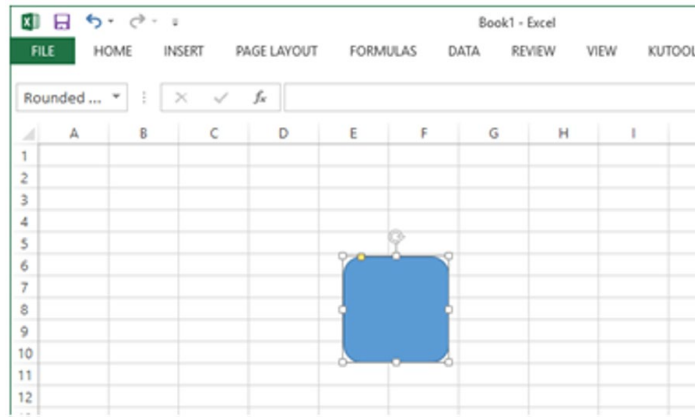
« The 3 buttons on the tab are illustrated here.

« To insert the buttons, use the Shapes option.

1 On the main menu ribbon, click on the Insert tab

2 Go to Shapes and click the drop-down arrow

3 Select the Rounded Rectangle icon.



This allows you to draw a rounded rectangle in the cells on the worksheet.



To format the shape and add text into the box, right-click on it OR double click on the shape and select Edit Text



Enter relevant text into the button



To turn the shapes into buttons, you need to add hyperlinks and the one displaying the search results is linked to a dynamic formula.



Once the text has been added, right click on the box to get the option to add hyperlink to the box. This will bring up a popup menu.



Under "Link to" column, select "Place in This Document"



Under the "Type the cell reference" section, type in the destination cell address.



Under the "Or select a place in this document" box, click to choose the particular sheet name

Click OK

ADDING THE FORMULA FOR THE SEARCH RESULTS

⏪ To hyperlink an excel formula for the search results button:

1 The formula to calculate the number of search results:

= SUBTOTAL(2,'Search Results Finance Options'!A:A)&" "&"RESULTS"

2 The formula is currently hidden in A1 of the mapping tab (see screenshot)

3 Use this cell reference (**= Mapping!A1**) to hyperlink the result button (this is where the formula that calculates the hits is housed)

4 The results button needs to be copy-pasted into the **Search Results Finance Options** tab.

1

2

3

4

5

6

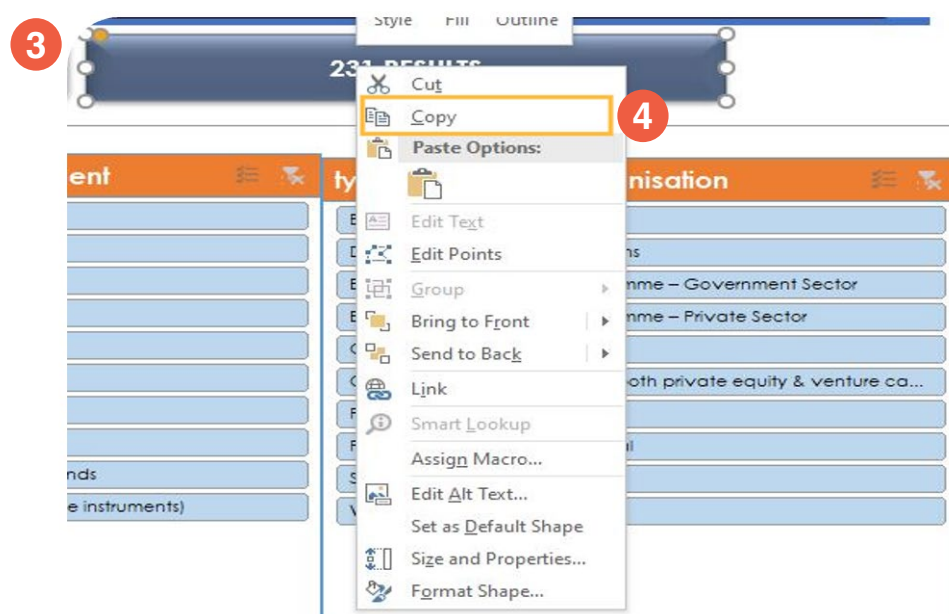
7

8

231 RESULTS

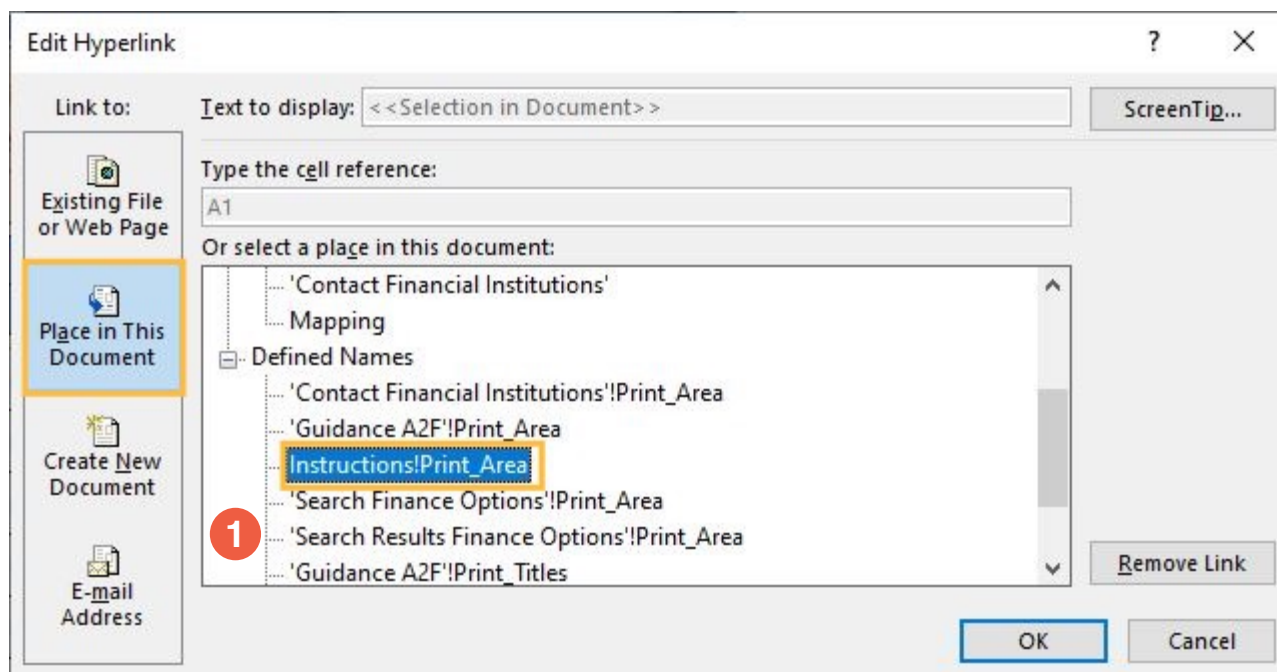
Don't touch

Name	Of Financing Organisation	EIP Initiatives Search
4Di Capital		Multiple initiatives (non-sector specific)
Actis		Environmental protection (monitoring (park-level) pollution control, prevention, and treatment)
Actis		Green buildings, park infrastructure
Actis		Renewable energy (solar, wind, hydro biomass hydrogen)
Actis		Energy efficiency (process changes, cogeneration, smart grid, heating/cooling)
Adlevo Capital		Multiple initiatives (non-sector specific)



TAB 4: GUIDANCE WORKSHEET

4.1 ADDING THE "GO TO INSTRUCTIONS" BUTTON



4.2 DATA ENTRIES ON THE GUIDANCE TAB

Market analysis	This is a quantitative and qualitative assessment of a market to look into the size of the market both in volume and in	Have you defined the target market?	Please select
		Have you researched market demographics?	Please select
		Have you ascertained the industry characteristics?	Please select
		Have you done a SWOT Analysis?	Please select
		Have you collected the required data for product development?	Please select



Various documents such as checklists and guidance notes were added to the database under the "Guidance A2F" tab.

- To insert the documents, they first need to be saved somewhere in the computer.
- Create a new worksheet to place the guidance information and notes.



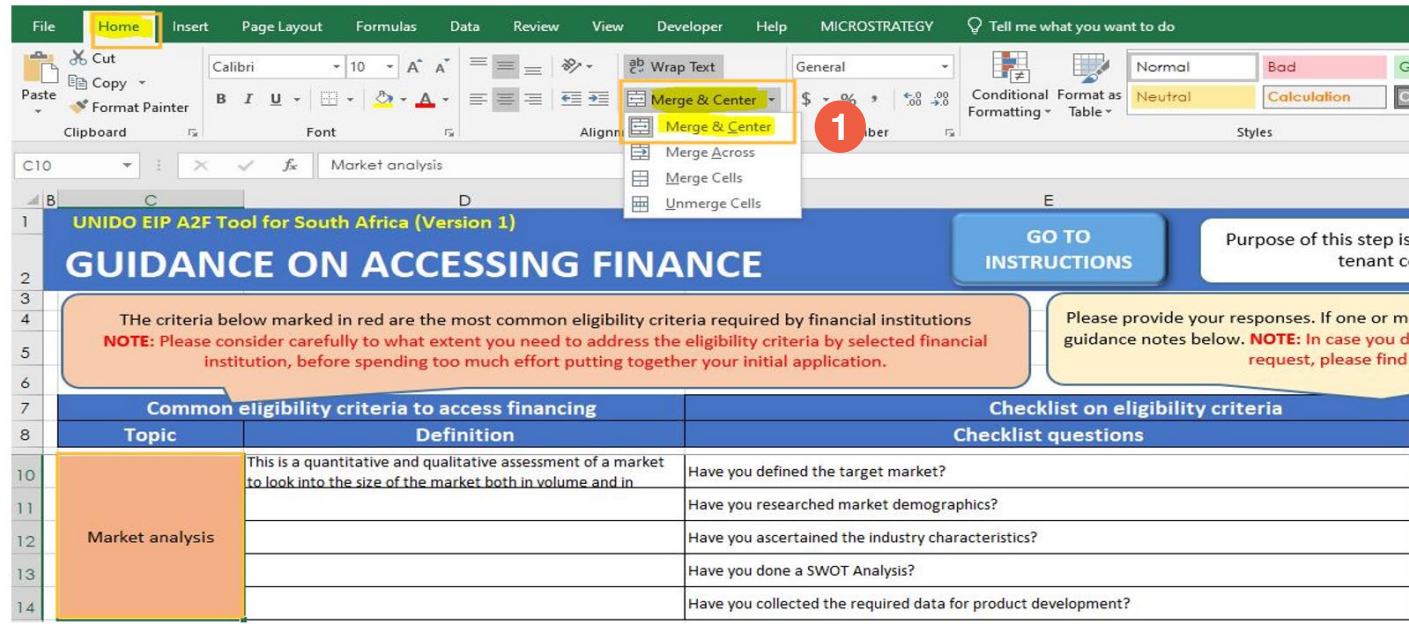
The button is added as per the previous instructions under **Section 5.6: Setting up the buttons for search financing database.**



The difference is that this button hyperlinks the **Instructions page** as highlighted.

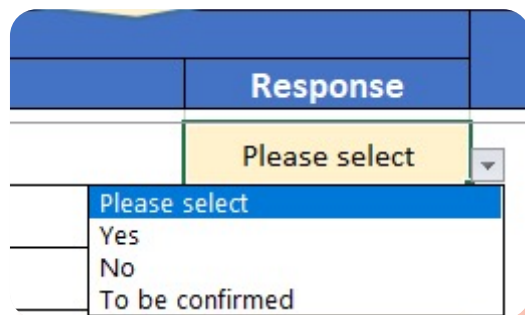


Data is entered on the tab and merged for a neater appearance.



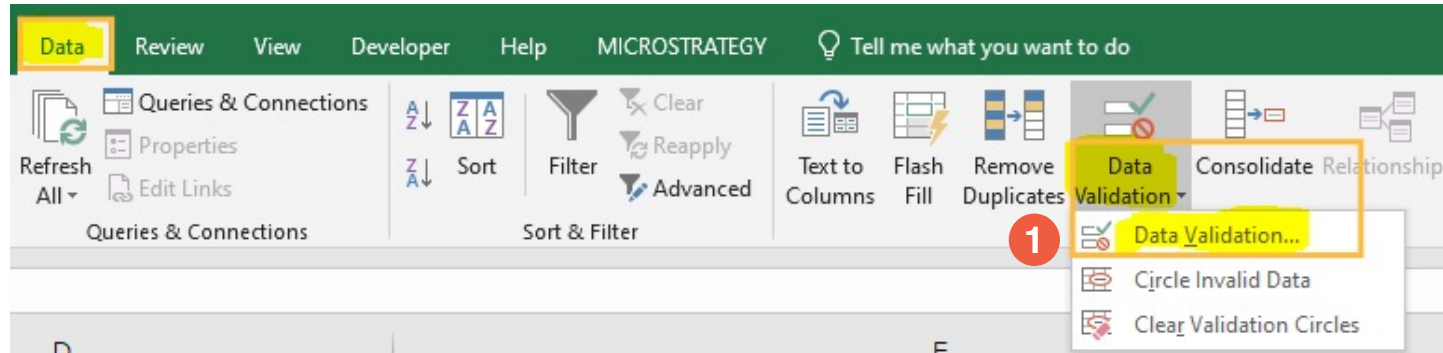
- 1 Select the cells you want to contain the data and choose the "Merge & Center" option from the **Alignment Options** on the Home tab on the Ribbon.

4.3 SETTING UP THE DROP DOWNS FOR RESPONSES

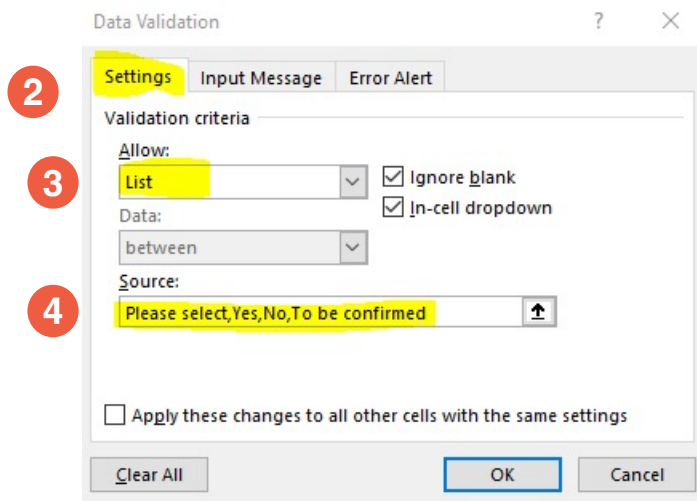


USER VIEW

- « Data validation is used for the responses in Column F with only pre-set options available for selection on the drop-down button.



1 The data validation is set up from the **Data Validation** option from the **Data** group on Ribbon.



<< Once you select **Data Validation**, a menu appears.

2 Go under **Settings**

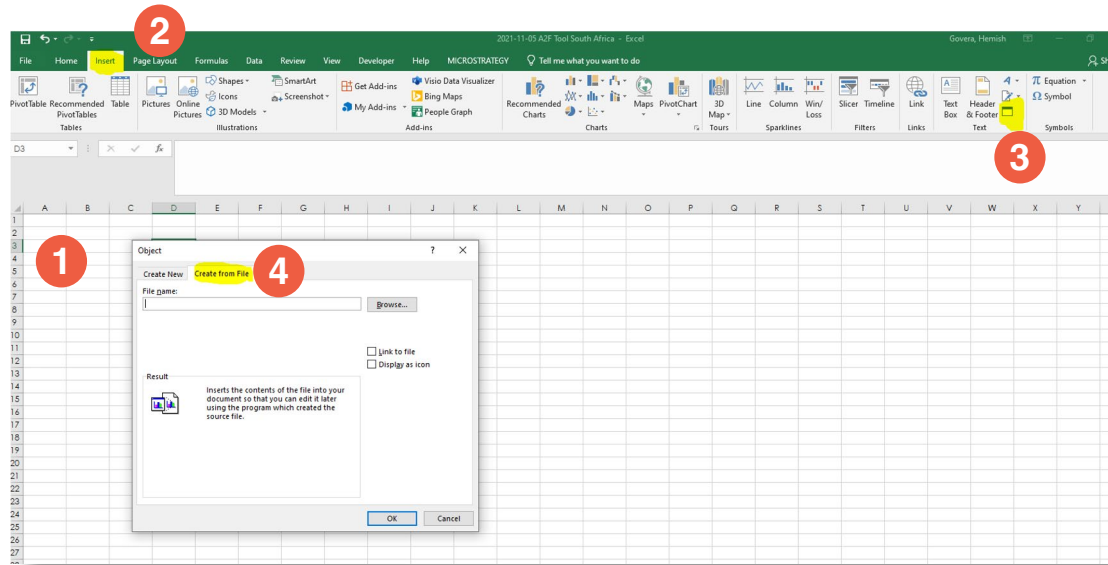
3 Select **List** under 'Allow'

4 Add the following drop-down options under **Source**:
'Please select', 'Yes', 'No', 'To be confirmed'

Have you defined the target market?	Please select
Have you researched market demographics?	Please select
Have you ascertained the industry characteristics?	Please select
Have you done a SWOT Analysis?	Please select
Have you collected the required data for product development?	Please select

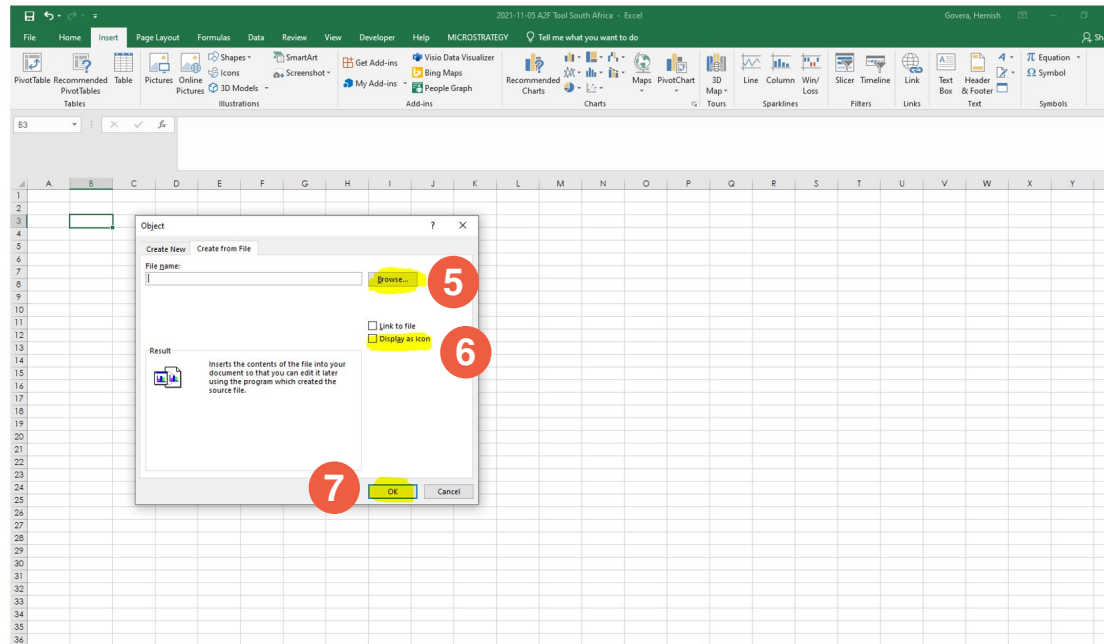
5 You can drag the data validation across multiple cells by pulling the handle on the bottom right of the cell.

4.4 ADDING THE DOCUMENTS

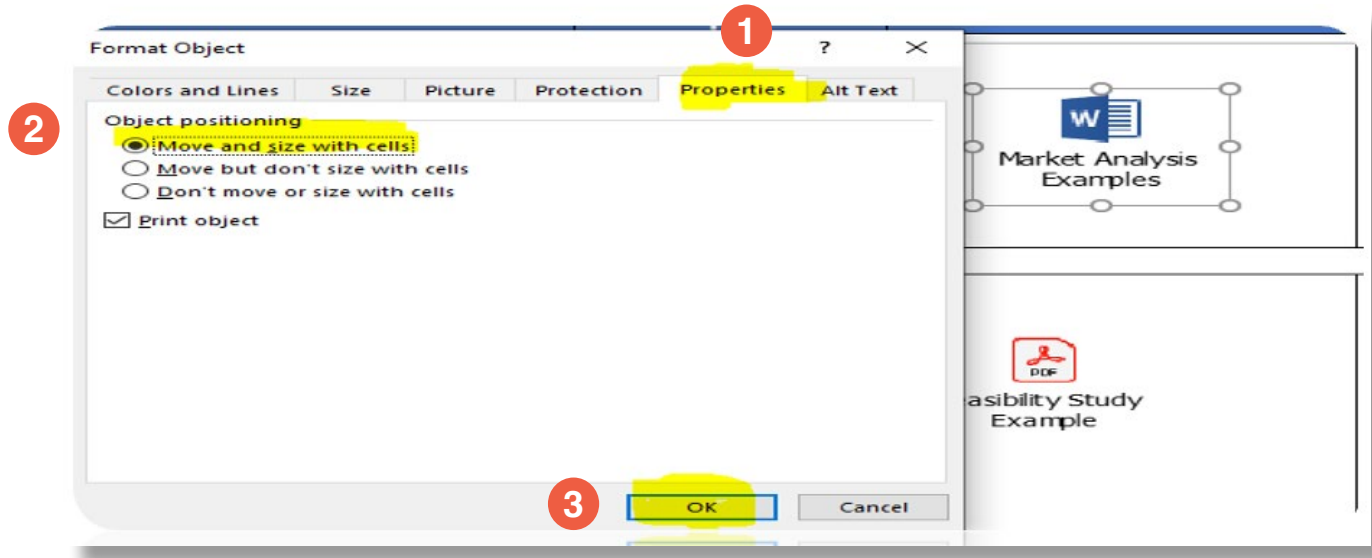


⏪ To insert the files into the excel cells:

- 1 Click inside the cell into which you want to insert the word/excel file
- 2 Click on the "Insert" tab
- 3 Click on "Object" under the Text group
- 4 Select "Create from File"



- 5 Browse your file
- 6 Select the "Display as icon" check box if you want to inset an icon linking to the files.
- 7 Click on "OK"



◀ To fit a document into a cell, right click on the document and select "Format Object" option

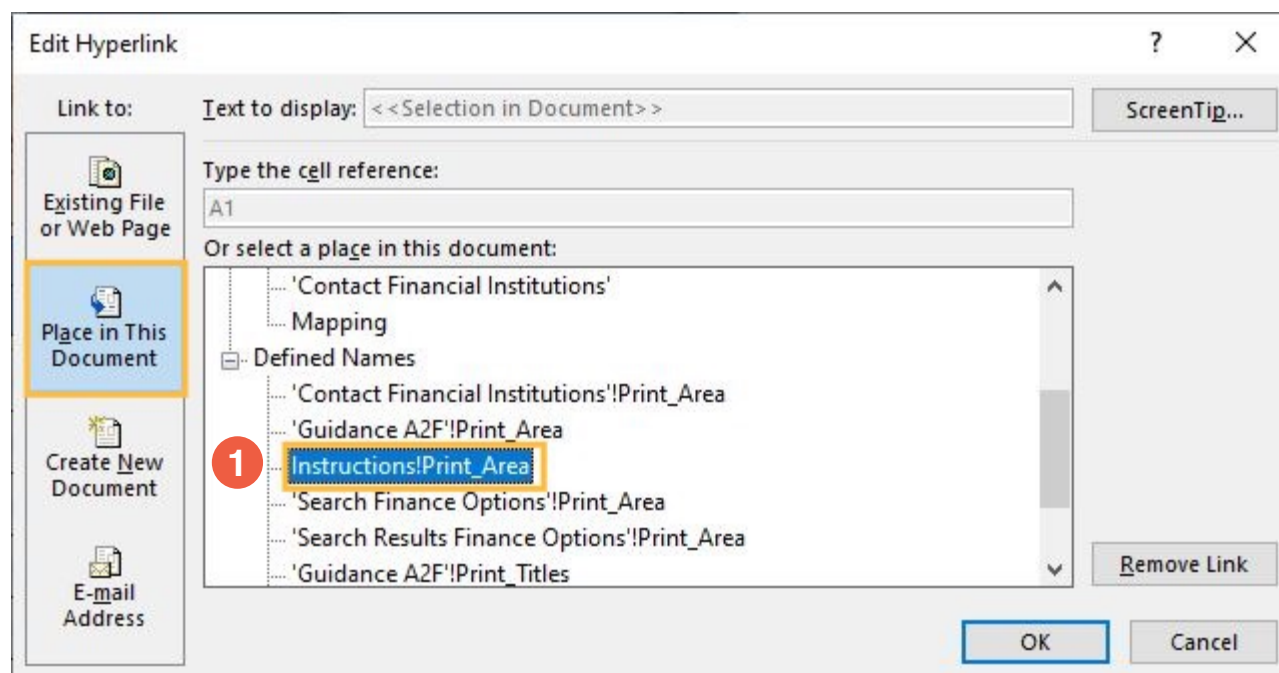
1 Click on **Properties**

2 Select the option "Move and size with cells"

3 Select **OK**

TAB 5: CONTACT FINANCIAL INSTITUTIONS FORM

5.1 ADDING THE "GO TO INSTRUCTIONS" BUTTON



The button is added as per the previous instructions under **Section 5.6: Setting up the buttons for search financing database.**

1

The difference is that this button hyperlinks the Instructions page as highlighted

5.2 DATA ENTRIES ON THE CONTACT FINANCIAL INSTITUTIONS FORM

UNIDO EIP A2F Tool for South Africa (Version 1)

FORM TO ESTABLISH CONTACT WITH FINANCIAL INSTITUTIONS

Please provide your input
into yellow cells

GO TO
INSTRUCTIONS

Purpose of this form is to assist industrial parks / companies to establish initial contact selected financial institutions to check that identified financing option is available and confirm detailed procedure to access financing option.

IMPORTANT NOTE: This is generic form. It is understood that some financial institutions have specific procedures to make financing inquiries and establish contact. These procedures should be followed of course, where applicable.

TARGETED FINANCIAL INSTITUTION AND FUNDING OPTION

Name financial institution:	
Targeted financing option:	
Contact person:	
Contact details:	

1

ORGANISATION SEEKING TO APPLY FOR FUNDING

Name of organisation:	
Type of organisation:	
Address of organisation:	
Contact person:	
Telephone:	
Email address:	
Date:	

REASON FOR ESTABLISHING CONTACT

	Please tick
Check that identified financing option is still available	
Confirm detailed procedure to access financing option	
Check if project is within scope of financing option	



This is a snapshot from the contact financial institutions form

1

Data is entered on the tab and merged for a neater appearance

1

The screenshot shows the Microsoft Excel interface with the 'Home' tab selected. The 'Alignment' group in the ribbon is active, and the 'Merge & Center' option is highlighted. The spreadsheet contains a form titled 'FORM TO ESTABLISH CONTACT WITH FINANCIAL INSTITUTIONS'. The form has a header section with a title and a 'GO TO INSTRUCTIONS' button. Below the header, there is a section titled 'TARGETED FINANCIAL INSTITUTION AND FUNDING OPTION' with four input fields: 'Name financial institution:', 'Targeted financing option:', 'Contact person:', and 'Contact details:'. The 'Contact details:' field is highlighted in yellow, indicating it is the target for the merge operation.

1 To merge the data, select the cells you want to contain the data and choose the “Merge & Center” option from the Alignment Options on the Home tab on the Ribbon

ANNEX 1: DATA COLLECTION QUESTIONNAIRE

This questionnaire can be used as an aid by the researcher to collect data on various funding sources and options

ADMINISTRATIVE DATA

Name of interviewer/fieldworker	
Date of interview	


1.	Name of company	
2.	Name of respondent	
3.	Contact details of respondent	Email: Website: Office/cell phone no.:

4.	Type of organizations you fund	
	1. Park Management 2. Large companies 3. SMEs	4. Various 5. Other, specify
5.	Define which financing sector you belong to	
	1. Private sector 2. Government sector 3. National donor funding	4. International donor 5. Public, private, community 6. Other, specify
6.	Type of Investment Instrument	
	1. Loan 2. Grant 3. Equity 4. Rebate 5. Debt Guarantee 6. Debt 7. Subsidy	8. Green bond 9. Impact investment 10. Social and dev. impact bond 11. Lottery funds 12. Crowdfunding 13. Various 14. Other, specify
7.	What type of financing organization are you?	
	1. Banks 2. Private equity 3. Venture capital 4. Development Finance 5. Sovereign wealth fund	6. Enterprise dev. programme– Private Sector 7. Enterprise dev. programme– Government Sector 8. Government department 9. Other, specify
8.	Type of EIP initiative	

	1. Climate change adaptation (flood control channels, dykes, natural cooling) 2. Property and utility maintenance 3. Occupational health, safety and hygiene 4. Community development 5. Carbon capture and storage 6. Energy efficiency (process changes, cogeneration, smart grid, heating/cooling) 7. Environmental protection (monitoring (park-level) pollution control, prevention and treatment)	8. Green buildings, park infrastructure 9. Green products and materials 10. Renewable energy (solar, wind, hydro, biomass, hydrogen) 11. Sustainable land management, (sustainable agriculture, forestry, park green areas, water catchment management) 12. Transport (urban rail/ metro, electric, hybrid, roads) 13. Waste management (reuse/recycling, waste management) 14. Water (water efficiency, wastewater treatment), water reuse networks at park level 15. Other, specify	
9.	Indicate your financing thresholds		
9.1	Minimum		
9.2	Maximum		

1.	Name of Fund	
2.	Name of person responsible for administering the Fund/ Providing information and support	
3.	Contact details	Email: Office/cell phone number: Organization url:
4.	What is the specific focus of the available funding	

5.	What are the criteria that would make a candidate eligible for funding?		
6.	What are the requirements/required documents needed to apply for funding		
7.	Do you know of other green funders?		
	1. Yes	2. No	
7.1	If YES, please provide the following		
	Name of the organization		
	Contact details of the organization		
	URL of the organization		
8.	Would you or someone from your organization be available to meet with organizations seeking funding		
	1. Yes	2. No	

 Vienna International Centre
Wagramerstr. 5, P.O. Box 300,
A-1400 Vienna, Austria

 +43 1 26026-0

 www.unido.org

 unido@unido.org



UNITED NATIONS
INDUSTRIAL DEVELOPMENT ORGANIZATION