

D6.1 REFINE Brand Strategy

REFIN 



REFINE has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement no. 894603

Document Summary Information

Grant Agreement No	894603	Acronym	REFINE
Full Title	Mainstreaming of refinancing schemes as enhancer for the implementation of energy efficiency service projects		
Start Date	01/06/2020	Duration	36 months
Project URL	https://refineproject.eu/		
Deliverable	D6.1		
Work Package	WP6 - Communication and Dissemination		
Contractual due date	31/08/2020	Actual submission date	
Nature	Report	Dissemination Level	Public
Lead Beneficiary	CARR		
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Revision history (including peer reviewing & quality control)

Version	Issue Date	Stage	Changes	Contributor(s)	Comments
V1	28.08.2020	Final	Review and revision by PC	Klemens Leutgöb (e7)	Version to be submitted to the EC

Executive Summary

D6.1 REFINE Brand Strategy

This deliverable, outlined as Deliverable 6.1 REFINE Brand Strategy in the Description of Action (DoA), provides evidence of advances towards the achievement of project objectives by defining the strategy of development and implementation of a consistent brand for the REFINE Project. This document sets out the initial plan and actions for the communication and dissemination of the project at this early stage through the development of a strong visual identity and unique brand for REFINE.

A basic definition of a brand is the array of perceptions and associations that the subject of the branding provokes in others. Branding is rarely left to chance and is mostly a carefully crafted and systematically implemented series of messages and actions that tap into the product/service/concept's name and identity. This is achieved in two phases - the first being definition and agreement, the second being the implementation plan to achieve the defined targets.

It is intended that the REFINE brand shall be an EU brand synonymous with the refinancing of energy efficiency service projects, which shall evolve throughout the project's 3-year lifetime as more events and activities take place. This influence is two way - it is both an influence on, and influenced by the activities of REFINE, its tools and instruments as they develop and as the project matures.

This report introduces the central branding components of REFINE such as Brand Anatomy, Brand Core and Brand Identity and Interactions. The Brand Core contains the DNA of the project which is the essence, values, vision, mission and promises of REFINE.

Part of this report touches on the guidelines for visual identity and verbal identity that influence colour, style and tone of voice in the public face of communication.

The REFINE Brand Strategy will have an impact on all other Deliverables to be submitted as part of the REFINE Project as it will provide guidance on the overall tone and direction of the project in the carrying out of research, events and other activities and in the communication and dissemination of these activities to identified stakeholders and the wider public.

This report is related most closely to D6.3 REFINE Website which is to be submitted on the same day and represents the first expression of the REFINE brand as it relates to the project's visual and verbal identity. The practices and lessons developed as part of D6.1 will be carried into the creation of the REFINE Collateral Pack (D6.2) and the first iteration of the REFINE Communication and Dissemination Strategy (D6.4) which are both due for submission in M6.

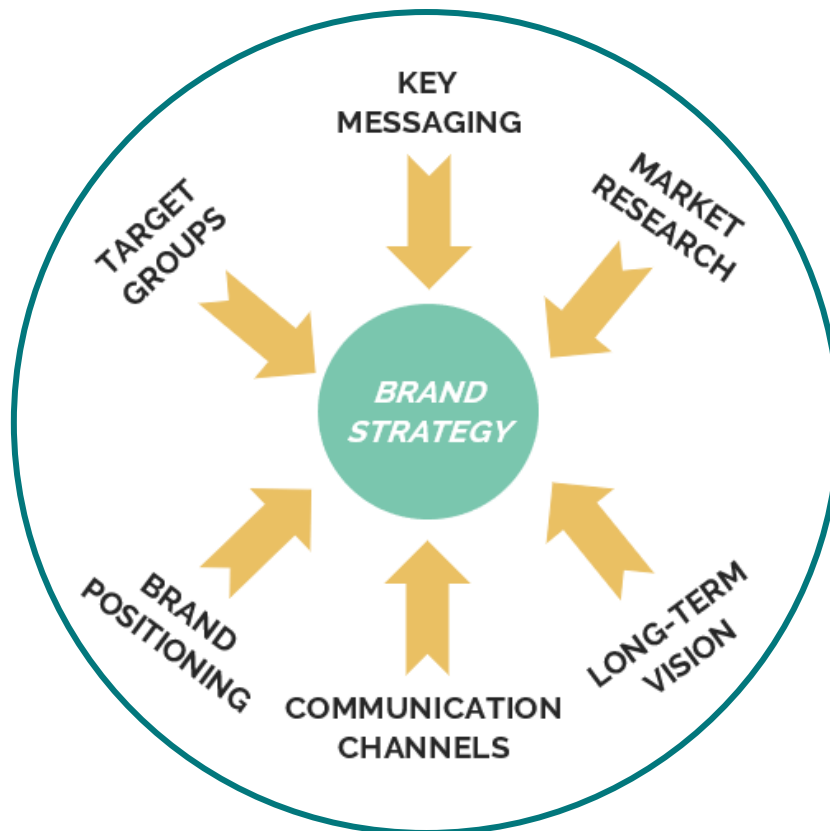


Figure 1: Symbiosis between elements of REFINE WP6 - Communication and Dissemination with D6.1 REFINE Brand Strategy

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REFINE GLOSSARY

Definition of important terms in the context of the REFINE Project

Taking into account the fact that some of the terms that are important in the context of the REFINE Project are not used in a uniform way throughout Europe, we present the following list of definitions

Energy efficiency improvement: An increase in energy efficiency as a result of technological, behavioural and/or economic changes

Energy efficiency improvement (EEI) action or EEI measure: An action normally leading to a verifiable, measurable or estimable energy efficiency improvement

Energy efficiency improvement (EEI) investment: An EEI measure that requires the use of upfront investments, usually through the involvement of a financial institution, and regardless whether these investments are related to hardware installations or to services.

Energy Efficiency Service (EES): Agreed task or tasks designed to lead to an energy efficiency improvement and other agreed performance criteria. The EES shall include energy audit as well as identification, selection and implementation of actions and verification. A documented description of the proposed or agreed framework for the actions and the follow-up procedure shall be provided. The improvement of energy efficiency shall be measured and verified over a contractually defined period of time through contractually agreed methods [EN 15900:2010]. If the EES includes EEI investments, it may or may not include financing of these investments.

Partial services connected to EES: Services that just include parts (“components”) of the EES value chain like design and implementation (excluding verification, for example), but are designed to directly or indirectly lead to an energy efficiency improvement. If the partial EES includes EEI investments, it may or may not include financing of these investments.

EES provider: A company that offers EES to its clients. Another term frequently used in this context is ESCO (energy service company), but this term is mostly connected to the provision of energy performance contracting (EPC) or energy supply contracting (ESC), which are specific forms of EES.

Energy Performance Contracting (EPC): A comprehensive energy service package aiming at the guaranteed improvement of energy and cost efficiency of buildings or production processes. An external Energy Service Company (ESCO) carries out an individually selectable cluster of services (planning, building, operation & maintenance, (pre-) financing, user motivation ...) and takes over technical and economic performance risks and guarantees. Most projects include third party financing. The services are predominantly paid out of future saved energy costs (Graz Energy Agency Ltd, 2008).

Financing Models for Market Growth: Financing Models that enable EES providers to clean up their balance sheet, thus gaining financial leeway for new projects. In many cases, these models contain a refinancing scheme.

Refinancing: In the context of the REFINE-project, we understand under this term a model, where an EES provider sells and a refinancing institution acquires receivables to be paid by an EES client, thus leading a restructuring of the initial financing set-up which may have been ensured through the EES provider’s cash flow, credit financing, leasing financing or other financial means.

Sale of receivables or sale of claims: umbrella term for any kind of receivables purchase agreements that allow a company (in our case an EES provider) to sell off the as-yet-unpaid bills or expected receivables from its customers.

Cession: In the REFINE-project, we understand cession as the legal term for the assignment of receivables.

Factoring: In the REFINE-project we use this term for a specific form of receivables purchase agreements, where short-termed receivables are sold. The non-payment risk remains with the seller.

Forfaiting: In the REFINE-project this term is used for the sale of longer-term account receivables usually without right of recourse. (widely used in export business)

1. Introduction

“Branding is an inherent human practice of all ages and all cultures, a way of showing who you are and what you do” - Miltenburg, 2016

Branding today

Today’s branding developed during the industrial revolution (Miltenburg 2016). As production scaled up and logistics became faster, there was a change in the way the customer found, engaged with, and consumed a product, as distances between producers and customers had increased. By the mid-twentieth century, most manufacturers could not compete on quality alone, as most goods on the market appeared quite similar. There needed to be a differentiating factor to make products identifiably distinct through a more emotional appeal, thus branding and advertising came into their own. Today, branding is used to orient people’s feelings and choices when they see or hear the brand of a product, service or person.

Brand name - development of actions

A “brand” is what a person thinks when he or she hears or sees a brand name - in this case REFINE. Although a brand name is real, since people can see it, at this stage the nascent REFINE brand is developing internally, within the small circle of REFINE partners who will be responsible for carrying out the actions agreed as part of the DOA. At this point in time, the REFINE brand stands for the ambitions of the project overall and the scale of change that the REFINE Project hopes to have in the area of refinancing of energy efficiency service projects. The brand will continue to develop over the course of the project, as its objectives are elaborated on and its goals achieved over the coming years. REFINE Project partners will continue to play a critical role in the development of the brand, and an even more important role in ensuring that the brand is used to effectively communicate the goals and ideals of REFINE.

REFINE activities that have influenced the branding

Since the REFINE kick-off meeting on the 3rd-4th June 2020 there have already been concepts and inputs towards some of the visual and verbal identities in terms of the REFINE brand name, typeface, layout, tag-line, logo, colour palette and tone of voice. In addition, the REFINE Twitter and LinkedIn accounts and project website were recently launched. All these products have components of the REFINE brand, indicating that brand identity of REFINE is already developing and is being put into practice.

Both during and in the aftermath of the kick-off meeting, project partners were consulted as to the future branding of the REFINE Project. These discussions included feedback from partners on the logo, colour palette, typeface, imagery and the layout of the REFINE website. Partners also contributed to the development of a glossary of important terms for the REFINE Project in order to properly communicate core aims and concepts. In addition, all partners contributed to a one-page description of the project including its core objectives and a description of its External Advisory Board. These were the initial steps in developing both the visual and verbal identity of the REFINE Project.



Figure 2: REFINE Project Twitter account



Figure 3: First tweet from REFINE Project Twitter

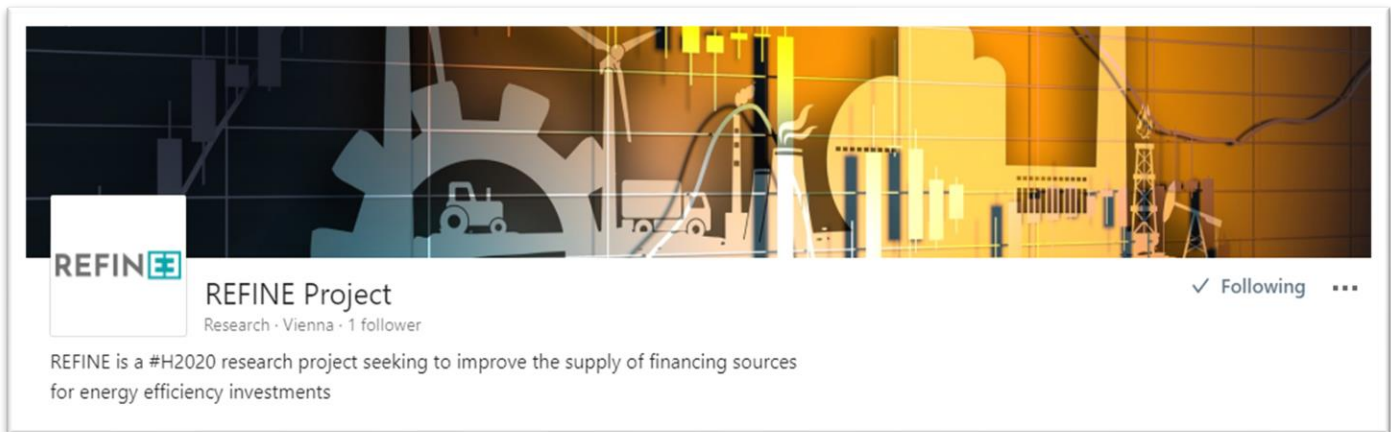


Figure 4: REFINE Project LinkedIn account

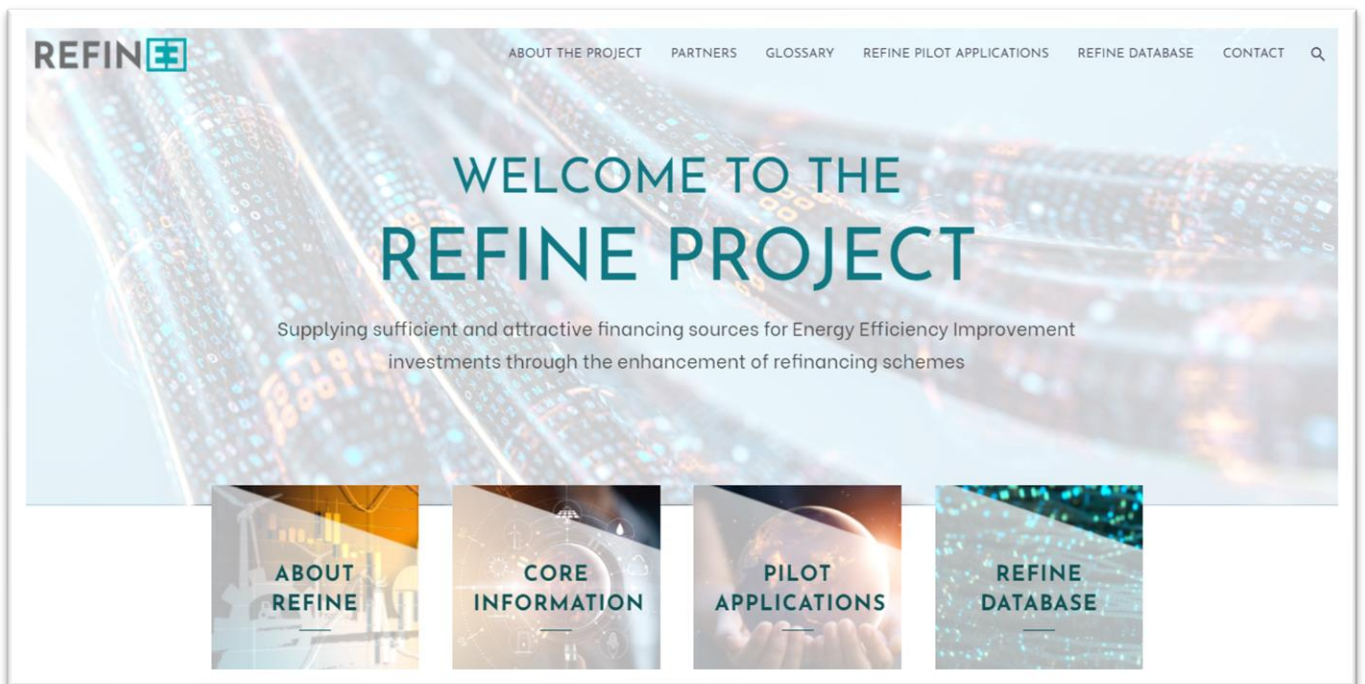


Figure 5: REFINE Project Website front page - <https://refineproject.eu/>

1.1 Addressing the REFINE Description of Action (DOA)

REFINE DOA requirements	Deliverable addressing DOA requirements	Descriptions
WP6 Objectives	D6.1 REFINE Brand Strategy	<i>Develop REFINE as a powerful EU-wide brand that is synonymous with the effective refinancing of energy efficiency projects</i>
Task 6.2 Refine Brand Strategy and Communications Collateral	D6.1 REFINE Brand Strategy D6.2 REFINE Communications Collateral Pack (due M6)	<i>A distinctive design is key to successful communication and dissemination activities and necessary for establishing REFINE as a prominent brand synonymous with supporting refinancing for energy efficiency projects. A bespoke brand strategy (D6.1) will be developed, including a brand story covering the tagline, positioning and value of REFINE. The REFINE brand strategy will also develop a strong visual identify, including logo, icons, typography and colour palettes.</i>

1.2 Document Outline and Purpose

This deliverable describes the development of the REFINE Brand Strategy that will guide aspects of the development and implementation of the REFINE brand both during the project life time (2020 -2023) and its legacy for the purposes of post-project commercialisation and exploitation activities.

In this report we will define the REFINE Brand Strategy. The Brand Anatomy forms part of the strategy and is made up of 3 components - Brand Core, Brand Identity and Brand Interactions - which shall underpin all creative communications.

Within the Brand Core, a number of creative taglines have been developed to appeal to the strategic audiences which the project hopes to engage with. Three of these initial lines include:

- **Supplying sufficient and attractive financing sources to energy efficiency investments**
- **Enhancing the refinanceability of energy efficiency projects**
- **Amplifying the use of refinancing in energy efficiency business practice**

These taglines speak broadly in the project’s “voice” and lay the foundation on which associations with the REFINE brand are made. These taglines will be adapted and refined during the project’s lifetime to ensure impactful, effective communication of REFINE’s activities.

1.3 Intended readership

D6.1 REFINE Brand Strategy is a critical component of the project’s future activities. All external communications and dissemination opportunities will be built from, and contribute to the REFINE brand. As such, this report is intended for REFINE Project partners, reviewers and advisors and members of the project’s Advisory Board. It should also be of interest to the European Commission H2020 project team, those involved in refinancing and energy efficiency services investment and research projects operating in the same domain as REFINE. D6.1 will also benefit the general public as it will define the REFINE brand in an area of increasing public interest (energy efficiency).

1.4 Relationship with other REFINE Deliverables and Tasks

The developed brand and this associated Brand Strategy will have a major influence on a number of the associated deliverables and tasks within the project. The activities influenced by this deliverable are listed below.

	Title	Lead	Document type
Deliverable			
D2.3	REFINE Database	SEVEN	Websites, patents, filings etc.
D2.4	Refinancing market assessment report	CREARA	Public Report
D3.7	Handbook on refinancing models for EES	E7	Public report
D5.1	Training materials	REGEA	Websites, patents, filings etc.
D6.2	REFINE communications collateral pack	CARR	Public Report
D6.3	REFINE Website	CARR	Public Report
D6.4	Dissemination and Communication Strategy	CARR	Public Report
D6.5	Dissemination and Communication Strategy - Interim Report	CARR	Public Report

D6.6	Dissemination and Communication Strategy - Final Report	CARR	Public Report
D6.7	Proceedings from REFINE final event	CARR	Public Report
D6.8	Exploitation Plan	CARR	Confidential

	Title	Lead	Task type
Tasks			
T1.2	Advisory Board	E7	Hosting a number of advisory board meetings with representatives of key institutions and stakeholders
T1.4	Common dissemination activities	E7	Contribute to common information sharing and dissemination activities across other research projects and coordinate internal project communication
T2.3	Qualitative expert interviews	SEVEN	Semi-structured interviews on refinancing mechanisms with financial institutions and energy efficiency experts
T2.4	Refinancing market assessment report	CREARA	Consolidation of findings and integration of knowledge from literature review and expert interviews
T3.6	Stakeholder workshops	E7	Collaborative workshops with key stakeholders to take place on both a national and European level
T5.1	Training material development	REGEA	Training materials to be developed for the project including presentation slides, e-learning modules, short learning video as well as a capacity building web portal, integrated into the project website

T5.2	Physical training events and webinars	REGEA	Physical training events and webinars to be carried out in each partner country
T6.1	REFINE project website	CARR	The creation of a dedicated REFINE website, which will be the central hub for all of the project's communications and dissemination activities, designed in line with the Brand Strategy
T6.2	REFINE brand strategy and communications collateral	CARR	The design and development of a unique REFINE brand strategy and the creation associated communications collateral (templates, technical posters, pull-ups, project brochures and leaflets)
T6.3	REFINE dissemination and community strategy	CARR	The development of a comprehensive strategy to maximise engagement, raise awareness and further the development of the REFINE brand
T6.4	High impact communication activities	CARR	Implementation of communications activities including social media management, press release campaigns and the continuous development of the REFINE website
T6.5	Networking with key stakeholders and establishing strategic partnerships	CARR	Active engagement and networking with key stakeholders including strategic listening, identifying key stakeholder targets and raising their awareness of the REFINE Project

2 Brand Strategy and Components

2.1 REFINE Brand Anatomy

*Brand anatomy is built from brand core, brand identity and brand interactions -
Miltenburg 2016*

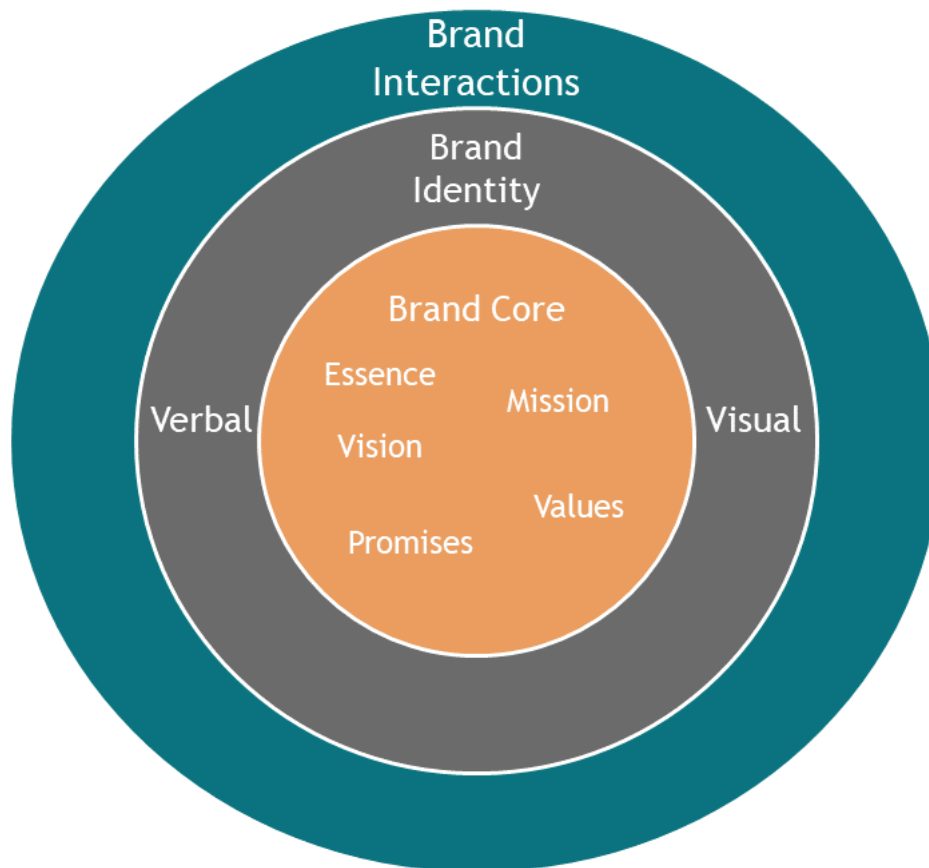


Figure 6: REFINE Brand Anatomy

2.2 Brand Core

Brand Core		
Components	What it does	REFINE
Brand Essence	The reason and purpose for REFINE	Supplying sufficient and attractive financing sources to energy efficiency investments
Vision	Defines the driving force behind the brand	To mainstream refinancing for energy efficiency service investments, making them more attractive to potential investors
Mission	Creates a shared sense of purpose	Encouraging and facilitating collaboration between all sides in refinancing and energy efficiency
Values	Sets criteria that aid decision making	Innovation Collaboration Expertise
Brand Promises	Shapes content for communication, presentation and pitches on REFINE	Streamlining the process of refinancing for energy efficiency projects to ensure greater uptake and investment

2.3 Brand Essence

Often the brand essence evolves and develops over the lifetime of a project. At this stage of REFINE, the project is just 3 months into 36 in total. The essence is a distillation of the vision, mission and values at the time they are created. Although they are adapted over the lifetime of the project as other elements develop, the essence remains the same and is the motivating principal for all project branding.

The current tagline '**Supplying sufficient and attractive financing sources to energy efficiency investments**' is impactful because it is both a statement of aims on behalf of the project to innovate new solutions and also an indication that the project is seeking to develop solutions which reflect current market needs and conditions.

It is the most compelling statement that picked up on the vision, mission and values of the REFINE brand developed to date.

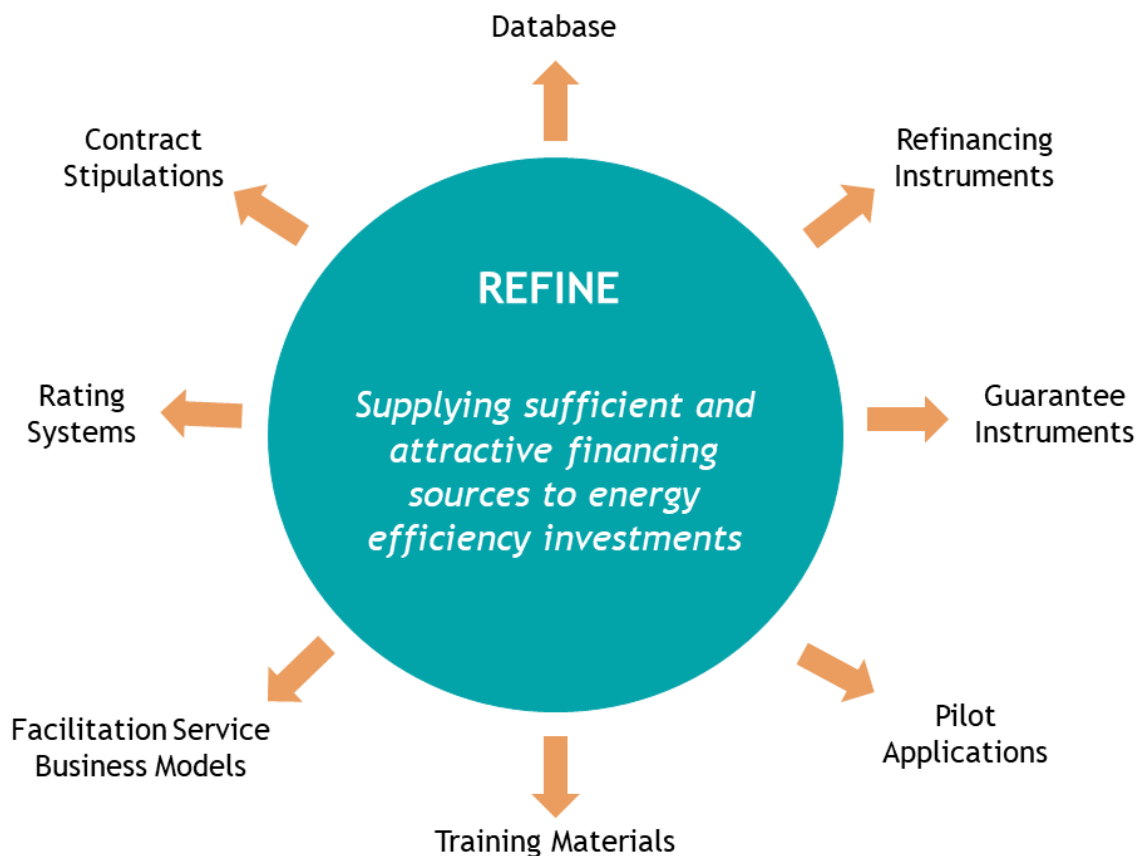


Figure 7: REFINE Brand Essence (with tagline and supporting elements)

2.4 Vision

What does the world that REFINE wants to see look like?

A world where the potential of future energy efficiency investments and large-scale projects is not hampered due to a lack of access for investors or a lack of knowledge on the part of financial institutions about EE investments.

The vision of REFINE is aligned to the stated goals of the European Commission:

- *To meet the objectives of the Energy Union and support the transition to a clean energy system, there is a need to further unlock private financing, in particular for energy efficiency investments.*
- *To change the risk perception of financiers and investors to energy efficiency investments*

REFINE hopes to address what European Commissioner for Energy Kadri Simson has described as the “ambition gap” for future energy efficiency across Europe.

2.5 Mission

REFINE seeks to bring together key stakeholder groups from both the financing and energy efficiency industries, to promote collaboration and to reduce the barriers for facilitation of future energy efficiency investments.

There currently exists a lack of knowledge among many financial institutions about the financing of energy efficiency. This has resulted in a high assumption of risk on the part of financial institutions which creates a barrier for future energy efficiency investments.

Similarly, greater work must be done to contribute to the understanding of EEI on the part of market facilitators, guarantee funds and policymakers at both a national and European level.

REFINE seeks to address these challenges through research (such as the REFINE Database, Market Assessment Report and Handbook on Refinancing Models for EES), collaboration (REFINE Advisory Board, Training Events and Stakeholder Workshops) and awareness raising activities (REFINE Website, dissemination opportunities, social media and exploitation activities).

2.6 Values

Brand values are the core values that are vital to the realisation of the brand. To ensure the brand is delivered in a consistent way, values are aligned to the brand vision and underpin the tasks and deliverables within the project.

The REFINE values are considered to be:

- Innovation
- Collaboration
- Expertise

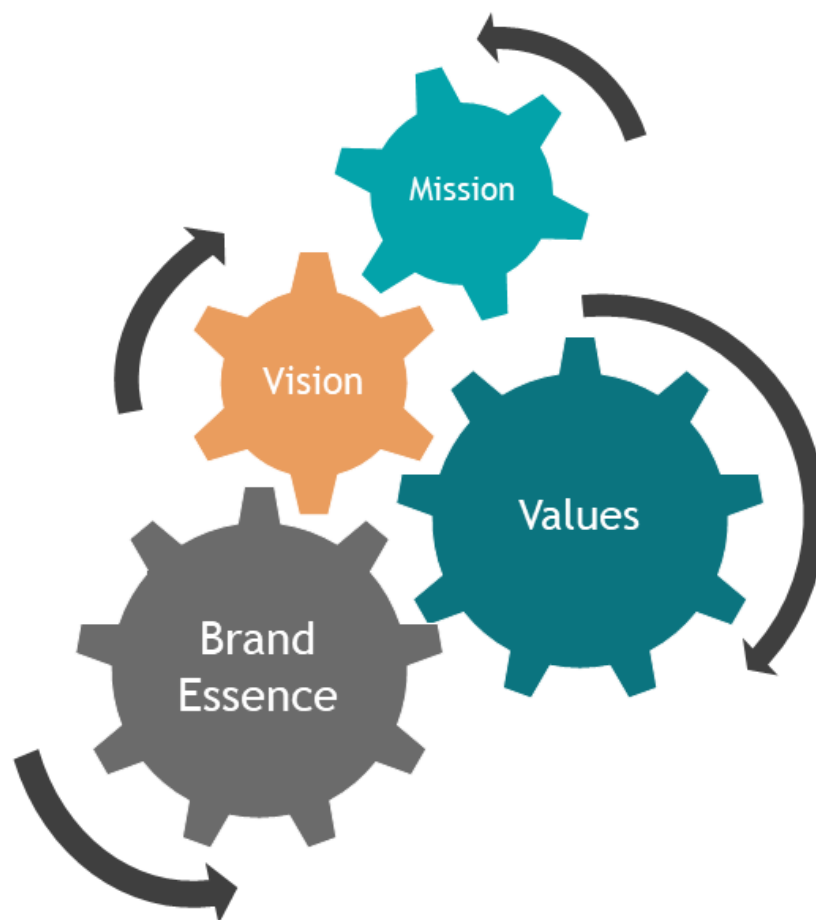


Figure 8: How the elements of the REFINE Brand Strategy work in cohesion

2.7 Brand Promises

Brand promises are the answer to the question the audience asks when considering whether or not to engage with the REFINE Project.

- What's in this for me?
- What does REFINE commit to deliver to its audiences?
- What value does REFINE add for them?
- How does it make their work easier?
- How does it empower them?
- What does REFINE help them to accomplish?

The brand promises are developed based on the research and activities of the REFINE Project and the results of the project itself. The core promises of REFINE rest with its proposed outputs and developments, which are made tangible over the lifetime of the project.



Figure 8: The promises and actions which will define the REFINE brand

2.8 REFINE Audiences

	Description of Audience	Relevance to REFINE	Dissemination Opportunities
Audience 1	Energy Efficiency Service Providers	Responsible for providing energy efficiency services to clients and for carrying out energy efficiency investment projects	<ul style="list-style-type: none"> • Stakeholder workshops • Training events • Research publications • Media coverage • REFINE final event • Project website • Industry events
Audience 2	Refinancing Institutions	Responsible for providing financing for energy efficiency projects in return for future receivables	<ul style="list-style-type: none"> • Stakeholder workshops • Training events • Research publications • Media coverage • REFINE final event • Project website • Industry events
Audience 3	Guarantee Funds	Typically State-owned and operated funds which provide support in securing the credit risks of a particular industry	<ul style="list-style-type: none"> • Stakeholder workshops • Training events • Research publications • Media coverage • REFINE final event • Project website
Audience 4	Market Facilitators	Energy agencies and specialist consultancies involved in energy efficiency services at an individual State-level	<ul style="list-style-type: none"> • Stakeholder workshops • Training events • Research publications • Media coverage • REFINE final event • Project website

3 Brand Identity

Brand identity encompasses both verbal and visual identity. It is the relationship between the tone of voice used in brand communications and the visual elements of the brand which make it instantly recognisable and differentiate it from others.

3.1 Verbal identity

3.1.1 Name and descriptor

The name REFINE is typical of H2020 projects in that it is an acronym of its project descriptor:

Mainstreaming of Refinancing schemes as enhancer for the implementation of Energy efficiency service projects

It is functional and communicates clearly that the project is involved in the mainstreaming of a current product (or “refining” it) to make it more accessible to potential end-users.

In the same way, REFINE’s previously elaborated on taglines have been developed to communicate clearly and succinctly the purpose of the project, as well as its benefits to the targeted stakeholder groups and society more widely.

3.1.2 Tone of voice

The tone of voice projected to the public through the website (and soon in the project’s social media channels) is serious and accessible.

Most of the planned activities are explained and written in accessible language. As the project is in its earliest months, regular news updates and project blogs will be curated for the website and social media which will outline the objectives of REFINE in a clear, accessible way for all audiences.

In developing the website, careful attention was paid to how the proposed actions were described. Visitors are given a high-level overview of the project at this early stage, with target audiences (refinancing institutions, energy efficiency service providers, market facilitators and guarantee funds) each having an individual section which explains what each audience is (helping visitors to identify their own relevance to the project) and what the REFINE Project can offer their sector in such a way as to generate interest upon their first visit to the site and to encourage future engagement and collaboration.

REFINE CORE INFORMATION

The ultimate goal of the REFINE Project is to contribute to the supply of sufficient and attractive financing sources to EEL investments through enhancement of refinancing schemes which are understood as important amplifier of market growth.

The Project has identified a number of key stakeholder groups in this process. Over the course of the REFINE Project, we hope to collaborate with these groups to improve the tools and instruments developed as part of REFINE.

These groups include:

- Energy Efficiency Service Providers
- Refinancing Institutions
- Guarantee Funds
- Market Facilitators

Figure 9: Landing page for REFINE Core Information with links for individual stakeholder groups

3.1.3 Editorial angle

The editorial angle, which will be elaborated upon in greater detail in D6.4 REFINE Communication and Dissemination Strategy is again ‘serious and accessible’. We shall focus on blogs, project updates and general news for the first year with the aim of reaching a wide audience interested in a range of subject matters influencing the field of refinancing and energy efficiency.

This process has already begun, with partners collaborating on a one-pager to define the project and its core objectives. This document has been utilised as the ‘About’ section on the REFINE website and has also been used by partners in reaching out to potential experts for the interviews being collected as part of T2.3 Qualitative expert interviews.

In order for the European Union to achieve its energy and climate goals by 2030, significant investment is required to make energy efficiency projects more attractive for potential investors and financial institutions. The European Union has therefore identified the promotion of an energy efficiency service (EES) market in Europe as a priority for the future.

In that context, the EU-funded REFINE project has identified the lack of attractive financing options for EES projects as a major barrier to the development of a functioning, robust EES market in Europe.

The goal of REFINE is therefore to contribute to the supply of sufficient and attractive financing sources to energy efficiency investments. Central to the development of a strong energy efficiency service market is ensuring the availability of financing sources for EES projects.

REFINE’s core objectives are:

- Enhancing the refinanceability of EES projects
- Amplifying the use of refinancing schemes in EES business practice

The above objectives will be achieved through the development of refinancing schemes enabling EES providers to clean up their balance sheet, thus allowing for future investment in new projects. REFINE will also seek to reduce transaction costs for refinancing schemes through standardisation. Finally, the project will facilitate greater risk assessment through increased transparency and the use of credit guarantees.

From the outset, REFINE is developing its solutions in collaboration with key stakeholders including financial institutions, EES providers, market facilitators and guarantee funds. Throughout the project, REFINE will cooperate with these stakeholders, using their expertise to identify and alleviate the risks associated with refinancing for EES projects. Coordination will also be sought among all parties to improve knowledge on the practical implementation of refinancing schemes and to promote overall awareness of the benefits of refinancing schemes on the financial feasibility of future investments.

The REFINE consortium is made up of 11 partner organisations from across Europe with expertise in the areas of refinancing and energy efficiency projects. The project has received funding from the European Union’s Horizon 2020 research and innovation programme under grant agreement no. 894603.

Figure 10: ‘About the REFINE Project’ section of the REFINE website

3.1.4 Sound

Sound plays an important element in brand strategy and in the development of a brand perception by a target audience. In advance of project videos being created, a collection of appropriate music will be curated, which will be solely instrumental and which will have a repetitive rhythm to evoke the dynamic nature of REFINE and the instruments which are being developed.

3.2 Visual identity

The overall visual identity for REFINE results from the union of a number of combined elements, most importantly the project's logo, typography and colour palette.

3.2.1 REFINE Logo



Figure 11: The REFINE Project logo

The logo was designed to communicate a number of aspects of the project in a visually attractive and unique, recognisable form. In keeping with the best-practice principles of logo design it is:

- Simplified down to its essential components
- Strong and inclusive in its use of colour
- Minimal in its reliance on graphic effects (such as drop shadows etc.)
- Clear and concise
- Achieves instant recognition

The use of the 'Double E' at the end of the logo is both to denote the project's relationship to **E**nergy **E**fficiency and to serve as a call-back to the Qualitee project, which has a similar focus on issues relating to energy efficiency services.

This furthers the understanding that the REFINE Project will not develop new solutions in a vacuum, but will undertake detailed research of the sector, engage with experts from across disciplines, build on the strength of previous projects and seek to engage with other H2020 research projects in the same area.

The typographic treatment and the use of colour in the logo are also employed and crafted to convey that REFINE is expert-led, serious and trustworthy, as colour psychology identifies blue is being associated with trust (McArdle 2013; DeVries 2016)

There are 2 further variations of the logo, one which is entirely white and another which sees the elements lightened considerably. This is to make the logo usable and visually appealing against darker backgrounds.



Figure 12: The REFINE Project logo - white and lighter adaptations

3.2.2 Typography

The choice of fonts for REFINE is specifically aimed to highlight both the professional and technical expertise behind the project while also looking to maintain a human and empathetic link.

To that end Trebuchet MS has been chosen as the main font for the project with Josefin Sans and BE Vietnam serving as secondary fonts.

Trebuchet has been described as “*created for use on the screen. Designed and engineered in 1996 by Microsoft’s Vincent Connare, it has a strong and unmistakable appearance. Borrowing elements from both the geometric and humanist classifications of sans serif type.*”

Its use primarily as a font for use online and in descriptions makes it relevant to the nature of modern project communications (primarily digital) and to the complexity of the REFINE Project’s objectives.



Figure 13: Trebuchet MS - Main font for the REFINE Project

3.2.3 Dynamic principles (animation, videos and infographics)

The dynamic principles will be developed over the course of the project as the brand language begins to finalise. The dynamic style so far is on display in the REFINE website which contains many dynamic, moving items and objects. These elements can be seen above in figure 5.

In the future, the website will also host interactive infographics in addition to project animations and videos as they are developed. This will further contribute to the dynamic principles of the project and will make the website more engaging and intuitive.

4 REFINE Brand Interactions

4.1 Communication and channels

N-PREP aims to reach those involved in the energy efficiency and refinancing sectors primarily. Brand communication takes place through media (both print and digitally including social media) events (such as training, workshops and participation in academic conferences and webinars) and networks (including clustering with other H2020 projects and in industry-focused events).

The communication channels and the timing of communications will need to fit with the brand core and the audience segment. Each event will be exploited to disseminate the key message required for the particular target audience. For example, on social media LinkedIn has been identified as a potential channel for the financial industry while Twitter may be more relevant for EU project consortiums undertaking research in the domain of energy efficiency. These channels and further interactions between audience segments and communication outputs will be elaborated on the D6.4 REFINE Communication and Dissemination Strategy due for submission in M6.

4.2 People, talent and behaviour

The REFINE team is made up of talented and motivated people. The challenge for brand communication in the coming months is to ensure

- The brand core is clear to all partners and is used by partners when representing REFINE
- Partners are aligned with core values, vision and mission of the brand core
- Partners are able to foster a consistent perception of REFINE in their contact with other people and organisations (forums, conferences, workshops)
- Partnerships are created with other groups with similar core values

4.3 Places and events

REFINE will be promoted at workshops, meetings, conferences and through relationships between identified stakeholder groups (energy efficiency service providers, refinancing institutions, guarantee funds and market facilitators) outside the consortium.

While most of the events REFINE will be organising are described in the DoA, the brand core values shall guide which events REFINE is represented and the type of involvement it needs. Potential events which could benefit from REFINE's involvement will be identified by partners as the project progresses and as the the awareness level of the project increases. This will also be developed upon further in D6.4 REFINE Communication and Dissemination Strategy

4.4 Products and services

REFINE products and services such as the refinancing instruments, rating systems, facilitation service business models and guarantee instruments are largely known. How the brand core affects these products and is involved in the presentation of these products individually, as well as via a unified REFINE toolkit, shall be worked through in D6.8 REFINE Exploitation Plan, towards the end of the project's lifetime and considering opportunities for commercialisation.

4.5 Partnerships and collaborations

Partnerships are created with other groups with similar core values in areas related REFINE's activities. Initially, these include experts and organisations taking part in T2.3 Qualitative expert interviews and T3.6 Stakeholder workshops. The goal of REFINE is not to limit the amount of feedback received from experts and organisations operating in energy efficiency and refinancing. The project seeks to have a deep understanding of the current market and to develop solutions beneficial to practitioners in this area. The project also hopes to collaborate with other H2020 projects operating in the same domain. REFINE partners have placed a large emphasis on this need for partnership and collaboration including its own task, T6.5 Networking with key stakeholders and establishing strategic partnerships, which will continue throughout the project's lifetime.

5 Conclusions

The branding of REFINE is centred around its brand essence which is '*Supplying sufficient and attractive financing sources to energy efficiency investments*' and targets those involved in refinancing for energy efficiency projects as its first audience.

All other audiences such as researchers, policy influencers and policy makers, industry and the wider public will be leveraged through the first tier. A key aspect of the branding will be to tell the story of the different spheres of innovation within REFINE.

The REFINE values which are Innovation, Collaboration and Expertise, correspond to REFINE's interdisciplinary nature, its focus on developing new solutions to existing problems, working with the industry and other researchers and benefiting from the knowledge of experts in this domain.

The Brand Identity shall be used for all public facing communication of REFINE instruments, tools, services and products, with a tone that is both serious and accessible.

The REFINE brand is still evolving and influenced on an ongoing basis by emerging feedback through expert interviews, stakeholder workshops and other project activities.

The latent potential for the REFINE Project to make a lasting impact on the future refinancing of energy efficiency investments is immeasurable. This Brand Strategy will go some way to begin defining the objectives, aims and scope of what the project can hopefully achieve.

6 References

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