

# D6.6 REFINE Dissemination & Communication Strategy - Final Report

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**REFIN** 



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## DOCUMENT SUMMARY INFORMATION

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## HISTORY OF CHANGES

Version	Date	Partner	Comments
V0.1 built on D6.5	05 May 2023	CARR	First draft
V0.2	10 May 2023	CARR	Partner-specific dissemination details inserted
V0.3	29 May 2023	CARR	Report submitted for internal review
V1.0	31 May 2023	CARR	Partner contributions integrated, final version for submission to the EC

## PROJECT PARTNERS

Partner number	Partner	Short name	Country
1	E7 ENERGIE MARKT ANALYSE GMBH	E7	Austria
2	CREARA CONSULTORES SL	CREARA	Spain
3	REGIONALNA ENERGETSKA AGENCIJA SJEVEROZAPADNE HRVATSKE	REGEA	Croatia
4	SEVEN, THE ENERGY EFFICIENCY CENTER Z.U.	SEVEN	Czech Republic
5	CENTRE FOR RENEWABLE ENERGY SOURCES AND SAVING FONDATION	CRES	Greece
6	INSTITUT JOZEF STEFAN	JSI	Slovenia
7	Carr Communications Limited	CARR	Ireland
8	FEDERESCO	Federesco	Italy
9	FUNDING FOR FUTURE BV	F3	The Netherlands
10	INTERNATIONAL NON-GOVERNEMENT ORGANIZATION HOUSING AND MUNICIPAL REFORM SUPPORT CENTRE	NGO HMRSC	Ukraine

## LIST OF ACRONYMS

Acronym	Definition
CHP	Combined heat and power
CINEA	European Climate, Infrastructure and Environment Executive Agency
DoA	Description of Action
EE	Energy Efficiency
EEl	Energy efficiency improvement
EES	Energy Efficiency Service
EPC	Energy Performance Contracting
ESCO	Energy Service Company
EU	European Union
GA	Grant Agreement
GDPR	General Data Protection Regulation
KPI	Key Performance Indicator
OA	Open Access
SEIF	Sustainable Energy Investment Forums
SPE	Special Purpose Entity
SPV	Special Purpose Vehicle

# EXECUTIVE SUMMARY

The primary purpose of this deliverable is to provide an account of the dissemination and communication activities conducted in the second half of the REFINE project (M19-M36), building on the strategy that was described in D6.4 Dissemination and Communication Strategy (M6).

The core objective of WP6 Communication and Dissemination is to develop REFINE as a powerful EU-wide brand that is synonymous with the effective refinancing of energy efficiency projects. This objective is achieved through the development of a unique REFINE brand identity, a website to display the objectives and work of REFINE and a list of targeted communication and dissemination activities to be carried out over the course of the Project.

To date, REFINE has become a leading brand within its sector and across various key communications and dissemination channels. Awareness of its goals, objectives and progress to date has seen continuous growth and technical progress and measurable results have provided a basis for effective dissemination and communication.

This Deliverable is an output of Tasks 6.1 (REFINE Project Website), T6.2 (REFINE Brand Strategy) and T6.3 (REFINE Dissemination and Communication Strategy) and contributed to the implementation of Tasks T6.4 (High Impact Communication Activities) and T6.5 (Networking with Key Stakeholders and Establishing Strategic Partnerships).

For the European Union (EU) to reach its ambitious energy and climate goals by 2030, there is a need to make energy efficiency projects more attractive for potential investors and financial institutions. The EU has therefore identified the promotion of an energy efficiency service (EES) market in Europe as a priority for the future.

In that context, the REFINE project is developing solutions to contribute to the supply of sufficient and attractive financing sources for energy efficiency investments by enhancing the ‘refinanceability’ of EES projects and amplifying the use of refinancing schemes in EES business practice.

REFINE’s Dissemination and Communication Strategy is a stepwise process that includes all incremental steps for strategic communication including:

- A clear definition of the project’s main goals and objectives for communication and dissemination,
- Identification of the REFINE target audiences and key messages to be used to reach out to them
- The methods and channels to be used for communicating the project,
- The dissemination processes to be followed by individual partners and
- The communication and dissemination tools created to maximise awareness and communications about the project and communicate

This document outlines the nature of communication to the selected target audiences, the key messaging and channels for communication, and the past and ongoing activities to ensure effective and impactful communication and dissemination of the REFINE project as it comes to completion. An overview of the communication and dissemination plan for REFINE is also included in this report however, further details on the future plans of the project's outputs are detailed in *D6.8 Exploitation Plan*.

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## REFINE GLOSSARY

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 (EE):** The ratio of output of performance, service, goods or energy, to input of energy

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

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

**Energy efficiency improvement investment:** An EEI measure that requires the use of upfront investments, usually through the involvement of a financial institution (FI), 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.

**Energy efficiency service 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 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:** 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:** A specific form of receivables purchase agreements, where short-termed receivables are sold. The non-payment risk remains with the seller.

**Forfeiting:** The sale of longer-term account receivables usually without right of recourse. (widely used in export business)

### Definitions of on-balance sheet types of financing

**Debt financing:** Situation in which investors lend a certain amount of money on credit in exchange for repayment plus interest. The most common EE financial product is a loan directly to the client (owner of the premises) or to the ESCO - this is known as third-party financing (TPF).

**Equity financing:** Situation in which investors lend a given amount of money in exchange for a stake in a project. The most common example of equity financing is private equity. With respect to energy efficiency businesses, equity investment can take the form of an ESCO issuing additional shares in the company's common ownership.

**Mezzanine financing:** Mezzanine financing is a hybrid form of financing that combines debt and equity financing. In most cases, debt will be ranked as a preferred equity share. Mezzanine debt financing is thus riskier than traditional debt financing but also more rewarding; it is associated with a higher yield. Mezzanine financing also allows a lender to convert debt capital into ownership or equity interest in the company if the loan is not paid back on time and in full.

### Definitions of off-balance sheet types of financing and entities

**Project financing:** Project finance, by contrast to on-balance sheet financing (loans, debt and equity), bases its collateral on a project's cash flow expectations,

not on individuals or institutions' creditworthiness. It is off-balance sheet financing. A typical project financing is divided between debt and equity financing.

**Leasing:** Leasing is the energy market's common way of dealing with initial cost barriers. It is a way of obtaining the right to use an asset. Finance leasing can be used for EE equipment, even when the equipment lacks collateral value. Leasing companies, often bank subsidiaries, have experience with vendor finance programs and other forms of equipment finance that are analogous to EE. Leasing is the most common form of equipment manufacturers' vendor financing, which is often applied in the case of combined heat and power (CHP) equipment. Leasing is often done as part of a Special Purpose Vehicle.

**Special Purpose Vehicle (SPV) / Special Purpose Entity (SPE):** A firm or other legal entity established to perform some narrowly-defined or temporary purpose, which facilitates off-balance sheet financing of projects. A standard approach is to form a SPV / SPE and place assets and liabilities on its balance sheet. The investors accomplish the purpose for which an SPV / SPE has been set up - for example implementing a large EE project - without having to carry any of the associated assets or liabilities on their own balance sheet.

# 1 INTRODUCTION

The communications and dissemination strategy is a key Deliverable within WP6. It sets out the goals, objectives and achievements of the project and beyond. Carr Communications (CARR), with the contribution of the REFINE partners, is the author and the lead partner for this Deliverable (D6.6) and the main contributor to the associated tasks T6.1-T6.5. However, all partners have contributed to the successful communication and dissemination of REFINE, especially on a national level with key stakeholders.

REFINE will contribute to the improved supply of financing sources for energy efficiency investments which has been identified for the EU as a key pillar in reaching its 2030 energy and climate targets.

The key outcomes of REFINE which constitute the core of the project's communication and dissemination include:

- The development of refinancing schemes enabling EES providers to clean up their balance sheet, thus allowing for future investment in new projects
- Seeking to reduce transaction costs for refinancing schemes through the standardisation of contract stipulations and brokerage services
- Facilitating greater risk assessment through the use of credit guarantee instruments
- The development of a rating system on refinanceability of EES projects

The above outcomes have been brought to fruition through a series of activities over the course of the project's lifetime. These include:

- The conducting of qualitative expert interviews with commercial banks and financial institutions
- Hosting stakeholder workshops at both a European and national level with financial institutions and EES providers
- The development of a Knowledge Management System based off evidence from the expert interviews and further analysis
- Testing the developed financing and guarantee instrument concepts through national pilot applications
- Conducting capacity building exercises through online webinars and training events with key stakeholders

The REFINE communications and dissemination strategy has enabled the project to conduct effective communication and dissemination of the project's activities and overcome various challenges. These challenges have included the specified nature of the REFINE target audience and the identification of the most impactful way to communicate with these stakeholders. Further, the strategy has enabled the project to conceptualise the outcomes of REFINE in a way that is immediately relevant to

these stakeholders. Finally, it is recognised that the instruments developed by REFINE will be most relevant to stakeholders at a national level, meaning communications activities, key messages and channels have been tailored as necessary throughout the project to reach and translate to a national audience as well as having a broader EU appeal. As a result, local dissemination plans were designed at the beginning of the project and have been implemented by partners in the national pilot countries of Austria, Czech Republic, Spain, Slovenia, Latvia, Greece, Croatia, Italy and Ukraine which are outlined in section 5 below.

This strategy has been developed in line with D6.1 REFINE Brand Strategy and D6.3 REFINE Website, and it builds on D6.5 REFINE Dissemination and Communication strategy - Interim Report. It features input from partners and establishes a report on the communication of the REFINE project in the second half of the project, M19-M36 (December 2021 to May 2023). It also outlines plans project's communications and dissemination beyond its end.

## 1.1 Addressing the REFINE Description of Action

The following segment of the Description of Action refers to D6.4, and this deliverable (D6.6) builds on the content presented in D6.4 and D6.5 (Communications and Dissemination Strategy - Interim Report):

*“A comprehensive dissemination and communication strategy is needed to maximise engagement, create awareness and promote project activities and results. This task involves the development of a plan of action and timeline for targeted communication activities. The strategy will describe objectives, methods, messages, tools, audiences and channels to be mobilised. It will include a digital and social media strategy to guide REFINE’s online activities, a media strategy to promote REFINE on TV, press and radio, and a stakeholder engagement strategy to establish dissemination partnerships e.g., with national bank associations and national energy efficiency initiatives. The strategy will account for the national differences in piloting areas. All activities will be monitored in and catalogued in the project’s monitoring tool and the strategy will be updated every year to ensure activities are on track in the interim and final reports (D6.5 and D6.6).”*

## 1.2 Document outline and purpose

D6.6 REFINE Dissemination and Communication Strategy - final report consists of the core objectives and structure for all completed, ongoing and any future project communication activities. This deliverable describes the development of the REFINE Dissemination and Communication Strategy with reference to the objectives of all project communication activities, the methods of communicating and disseminating the REFINE project, key audiences and their relevant messaging and the selected

channels for the impactful communication and dissemination of REFINE. The focus is on the achievements of the second half of the project (M19-M36) and the plans the project's communications and dissemination beyond its end in M36.

The structure of this Deliverable is as follows: The report first discusses the REFINE approach to its communication and dissemination. It then presents the communication strategy and achievements up from M19-M36 and the dissemination strategy and achievements up to M19-M36. This is followed by country-specific achievements and future communication and dissemination plans. The final section focuses on measurement and analysis, providing an overview of the project's status in relation to its KPIs and internal procedures.

### 1.3 Intended readership

This report is public and will therefore be openly accessible and of interest not only to the REFINE project partners but also to those involved in refinancing and energy efficiency services investment. It will also be of benefit to research projects operating in the same domain as REFINE as it presents an opportunity for greater understanding of the project, its main objectives and expected outcomes.

### 1.4 Relationship with other REFINE deliverables and tasks

Due to the scope of D6.6 REFINE Dissemination and Communication Strategy - Final Report, it has an impact on all other Deliverables and Tasks associated with WP6 and further, contributes to all other Work Packages in planning for the dissemination and communication of the project's key outputs. Ultimately, this deliverable acts as a culmination of the implementation of the REFINE Dissemination and Communications Strategy.

This Deliverable directly informs T6.4 High Impact Communication Activities as the Deliverable outlines the main communication and dissemination activities conducted by REFINE partners in the second half of the project. D6.6 governs the implementation of these activities at both a European and national level and has provided a guide for the appropriate communication and dissemination channels and key audiences with references to the relevant pilot countries.

This Deliverable contributes additionally to T6.5 Networking with Key Stakeholders and Forming Strategic Partnerships as it provides an update on interactions with these stakeholders to date as well as engagement efforts via participation in events and clustering with other H2020 projects. Further, D6.6 provides an overview of the main dissemination channels used by the REFINE Project including news articles, academic journals and international and national conferences.



## 2 THE REFINE APPROACH

### 2.1 Four phases of communication and dissemination

Through our experience as Work Package leaders in communication and dissemination across over a dozen H2020 research projects in the last decade, and through our experience with domestic public relations clients from our foundation in 1973, Carr Communications have developed a four-phase strategy for the high-level, impactful communication and dissemination of EU-funded projects.

These phases are both iterative and continuous, meaning that although they take place at different stages of project development, each phase continues in addition to those which follow, helping to provide guidance and structure to the project's overall communication and dissemination activities over their lifetime. These phases are outlined as follows:

- Phase 1: Understanding the REFINE Audience
- Phase 2: Clarifying the REFINE Message
- Phase 3: Engaging meaningfully with the REFINE audience
- Phase 4: Changing attitudes and behaviours

The four phases are covered in detail in D6.4 REFINE Dissemination and Communication strategy.

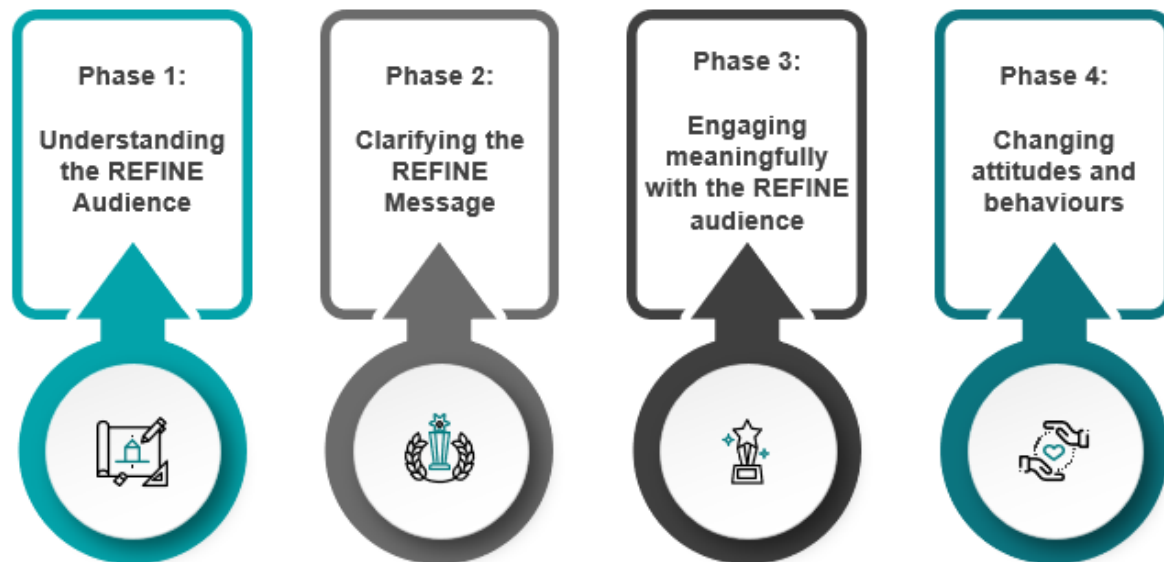


Figure 1: Four phases of communication and dissemination

### 2.2 Gender and non-discrimination aspects

We strive to consider non-discrimination and gender aspects and to encourage gender balance across all our communication and dissemination activities.

We endeavour to be gender inclusive in our use of language and imagery; female or gender-neutral pronouns are used in addition to male pronouns, and terms and titles that reference males only are avoided where possible. We are also mindful of the imagery that we choose to use across communications platforms as images can either challenge or reinforce gender stereotypes. In addition, we implement the principle of equal treatment between persons irrespective of racial or ethnic origin, religion or belief, disability, age or sexual orientation in all of our dissemination activities.

### 2.3 Coronavirus contingencies

The Coronavirus pandemic was at a height at the beginning of the REFINE project and has recently come to an end as declared by the [World Health Organisation](#). The pandemic inevitably affected everyone and every aspect of society, and the activities within REFINE were no exception in this respect. From a dissemination perspective, cancelled events resulted in missed opportunities for the dissemination of project progress and results, less content to interact with and to share across the REFINE channels, less conference proceedings and a pause in face-to-face networking and collaboration etc.

However, the REFINE consortium made the best of the situation and put processes in place to ensure business continuity while promoting the necessary health and safety precautions. We continued to work, albeit remotely, and followed the agreed work plan without interruption. In person project meetings were able to resume in MX following official health guidelines followed by events and conferences. The pandemic had a lasting effect and so we continue to conduct many communication and dissemination activities online and utilise all digital means at our disposal to maintain the planned level of activity.

The REFINE team was already equipped to operating in a virtual environment and adapted to the challenging circumstances rapidly. A contingency plan was devised to allow us to respond smoothly in case key members of staff became unable to work due to the Coronavirus and this plan remains in place. It involves a division of the REFINE dissemination team into Team A and Team B, where a member of Team A can step in if a member of Team B becomes unable to work and vice versa. The team was guided by the [HSE COVID-19 Public Health Advice](#) which provided guidance in relation to health concerns, protecting yourself, symptoms and procedures.

By following these procedures and plans, no deviations from the REFINE work plan occurred due to Covid-19.

# 3. COMMUNICATION STRATEGY AND ACHIEVEMENTS FROM M19-M36

## 3.1 Overview

Based on the phased approach outlined in Section Two, the REFINE communications strategy aims to guide the project’s communications outputs throughout the project. while (1) addressing the requirements of the Description of Action and (2) communicating the project in the most suitable and effective methods.

### 3.1.1 Communication objectives

*What do we want from REFINE communications?*

Key communications objectives include:

- Develop awareness of the REFINE project and its expected impact on the future of energy efficiency in Europe
- Generate interest among key stakeholders (and the general public) on the solutions being developed by REFINE and why these new innovations matter
- Encourage the adoption of the REFINE project outputs by target audiences in refinancing and energy efficiency

### 3.1.2 Communication audience

*Who are REFINE communicating to?*

Key target audiences include:

- Energy efficiency service providers, refinancing institutions, guarantee funds, market facilitators and banking associations at both a European and national level.
- Examples at a European level include the European Investment Bank (EIB), European Investment Fund (EIF), European Energy Efficiency Fund, European Banking Association (EBA), European Banking Federation (EBF).

Further details on target audiences can be found in Annex 2. In addition, each partner has identified local target audiences (see section 5).

### 3.1.3 Communication methods

*How will we carry out REFINE communications?*

Communications activities are carried out through various methods depending on the specific goal and objective of the action. These include but are not limited to:

- The application of the REFINE brand and the amplification of project outcomes across traditional, digital and social media and via the REFINE website
- The development of high-impact communications collateral including infographics, animations, project brochures, leaflets and information on the REFINE website including news updates and blog posts
- Targeted engagement with identified stakeholders at both a European and national level through both direct contact (expert interviews, stakeholder workshops, training sessions, webinars and project conferences and events).

Over the lifetime of the project, we have created digital and printed communication material. A broad range of communications resources including templates for PowerPoint and Microsoft Word were presented in D6.2 REFINE Communications Collateral Pack in M6. In the first half of the project the REFINE technical poster template was also shared amongst partners for the creation of research posters and poster presentations at key conference. In the second half of the project, the designs of the REFINE leaflet, poster and pull-up banner have been updated accordingly and are presented in the figures below. All materials follow the REFINE brand guidelines presented in D6.1.



Figure 2: Updated leaflet outside



### The Current Situation

In order to achieve the EU's ambitious energy and climate goals by 2030, there is a requirement for additional investment of approximately 167 billion euro per year in the years from 2021 to 2030.

Against this background, studies have been published that confirm the existence of huge amounts of economically attractive, yet untapped potential within energy efficiency service (EES) projects.

The challenges facing the viability of EES projects include:

- 66% of EES providers report finding it difficult or very difficult to obtain access to viable financing
- EES projects are often perceived as being complex and granular in detail and suffer from low levels of understanding on the part of financial institutions
- As most EES projects are small in scale, there is a perception of low return on investment from potential investors
- Countries across the EU take various approaches to the refinancing of EES projects which has hampered the development of an EU-wide market for the refinancing of EES projects

### Outcomes of REFINE Project

Refinancing Concepts

Contract Stipulations

Guarantee Instruments

Facilitation Service Business Models

Refinancing Rating Systems

### REFINE Pilot Applications

In order to test the solutions developed within REFINE, the project conducted 42 pilot applications in active EES projects across 9 European countries.

The REFINE solutions were implemented and evaluated in collaboration with EES providers and financial institutions.

### The REFINE Solution

REFINE partners are united by the goal of contributing to the supply of improved financing sources to EES investments through the enhancement of refinancing schemes which are understood as important amplifiers of market growth.

The objectives of the REFINE project include:

- Improving the understanding and application of refinancing schemes for EES projects on a pan-European basis.
- Reducing transaction costs for EES projects through increased standardisation and risk mitigation approaches
- Developing shared schemes and solutions in collaboration with EES providers, financial institutions, market facilitators and guarantee funds to advance refinancing for EES projects

### Objectives of the REFINE Project

- Enhancing the refinancing of energy efficiency service (EES) projects
- Amplifying the actual use of refinancing schemes in EES business practice

### Countries with REFINE Pilot Applications

Austria	Croatia	Italy
Slovenia	Greece	Czech Republic
Ukraine	Spain	Latvia

Figure 3: Updated leaflet inside

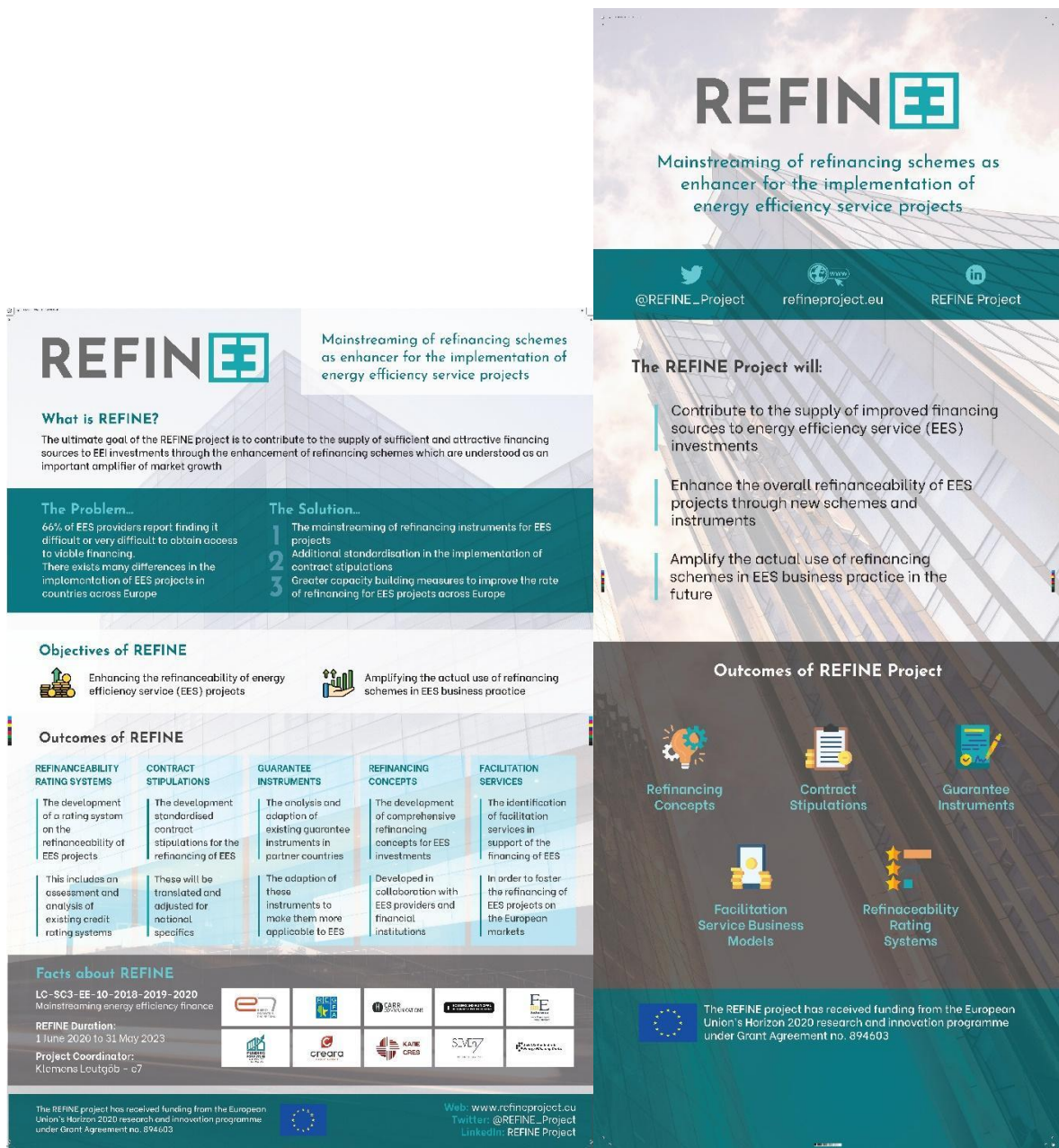


Figure 4: Updated pull-up banner and poster

### 3.1.4 Communication messages

What is REFINE saying in its communications?

Key messages include:

- REFINE will help Europe to reach its ambitions for future energy efficiency
- REFINE will streamline and simplify future financing for energy efficiency projects
- REFINE will help to facilitate the establishment of an energy efficiency ecosystem for future investment

- REFINE will work with partners from business, finance and the energy efficiency to improve the supply of financing sources for energy efficiency investments

The key messages are presented in more detail in D6.4 Dissemination and communication strategy.

### 3.1.5 Communication channels

*What channels is REFINE communicating through?*

*Key communication channels include:*

- Website
- Newsletters
- Traditional and digital media
- Social media channels: Twitter and LinkedIn

These channels are presented below with an overview and updates from M19-M36.

#### WEBSITE

The REFINE website serves as the nucleus of online dissemination of the project's key outputs, while the other digital channels amplify the key messages from the website. The site serves as a powerful dissemination tool and a core element of engagement with the target audiences for the project. It is also directly linked to the REFINE social media channels through active icons that direct the visitor to the REFINE accounts of the respective social media platforms.

The REFINE website went live in M3 (August 2020). The website also serves as a central virtual hub for all post-project activities as it will stay live for 5 years after the end of the project. Currently, the website is managed by communication leaders CARR and as part of the project's communications strategy, they will complete a full review of the website by the project end to ensure it is prepared for the post-project phase.

The website is updated regularly with project activities, relevant news, upcoming events blog posts and articles from partners on the progress of the REFINE project. Thirty-three (33) news pieces and eleven (11) blog posts have been published on the REFINE website by M36. Additionally, there are seventeen (17) REFINE deliverables available which constitute the key outputs and tools of REFINE. The website framework is designed to be flexible and agile in its structure, allowing for evolution and expansion throughout the project lifecycle and beyond. The 'most visited' and 'most downloaded' content will be given further prominence in future updates to the website.

The website is designed to be easily navigable and be a definitive and comprehensive source of information regarding REFINE. Key updates to the website since M19 have included the expansion of the REFINE Knowledge Centre (screenshot in Figure 5)



which houses the project’s deliverables. Each deliverable has been organised between one of two sections covering the project’s ‘Concepts and Tools’ and ‘Market Overview’ allowing key stakeholders and website visitors to easily locate the REFINE toolkit. Additionally, the project’s eLearning centre and pilot applications are hosted in the centre. While the eLearning centre provides clear videos, downloads and eBooks covering four key modules related to the use of the REFINE tools, the pilot applications present real life examples of the tools in action. A screenshot of how they appear on the website can be seen below in Figure 6. The pilots can be filtered by country, pilot and REFINE tool.

The REFINE website is also used to host content relevant to multiple stakeholder groups, providing updates on the progress of the project while also delivering audience specific news. One of the methods this is delivered through is our project newsletter which is now delivered via LinkedIn, further details are outlined in the following section on our Newsletter.

Finally, we have also added the ‘CC BY’ logo on the REFINE website on the webpages that host the project’s deliverables (Knowledge Centre) to coincide with the Creative Commons International Licence which the consortium collectively agreed upon to licence the REFINE outputs. Further details on this are included in D6.8 Exploitation Plan.

Currently, key elements of the site are available in 10 European languages and those of the REFINE pilot application countries: English, Czech, Ukrainian, Spanish, German, Italian, Greek, Latvian, Croatian and Slovenian. The language menu is located at the top of the website. ‘Country Specific News’ sections have also been created to allow for targeted news dissemination for each partner country. The figure below shows the landing page with the drop-down language menu. Given the substantial cost of continuing the translation service beyond the project end, it will conclude with the project and English will remain as the main language of the website. However, any articles, press releases or additional project materials that have been officially translated by partners and uploaded will also remain on the site.

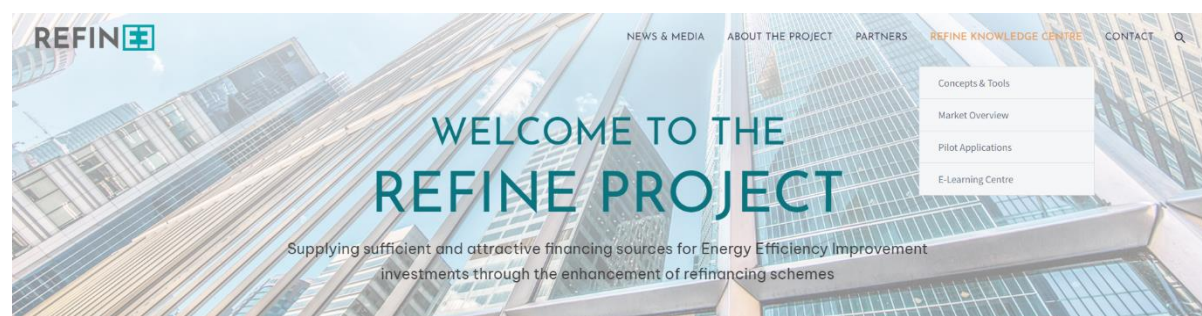


Figure 5: REFINE Knowledge Centre



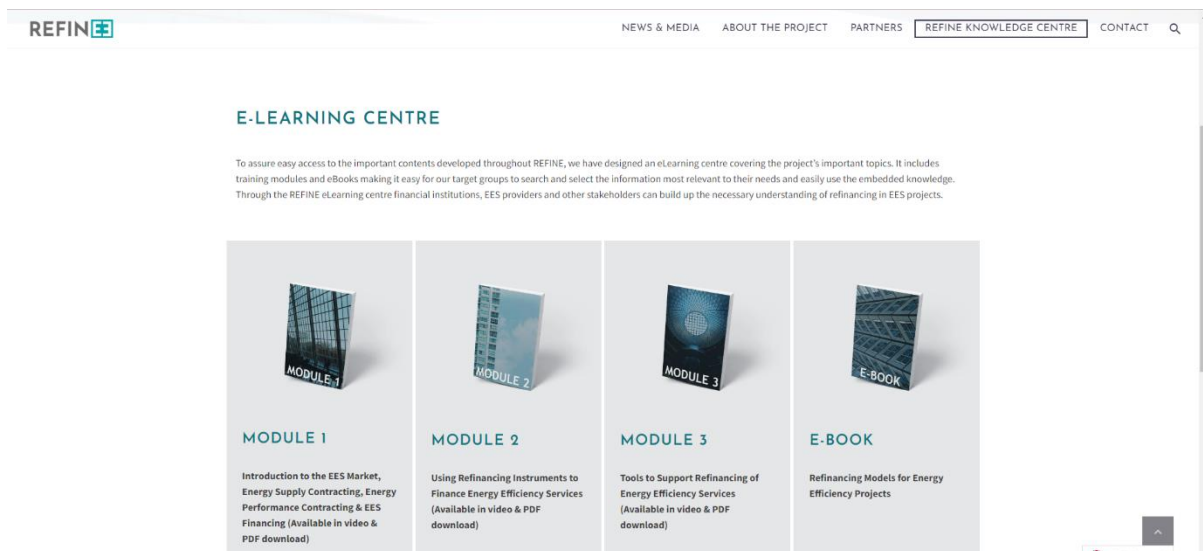


Figure 6: REFINE eLearning Centre

## NEWSLETTERS

The REFINE newsletter provides regular updates on progress and results, past and upcoming events, and collaboration with related projects. Since M19 we have updated our newsletter delivery platform to LinkedIn given its viability for further reach and engagement with our established online audience. The newsletter is produced using the newsletter function on LinkedIn and delivered to subscribers' (i.e. people who follow the REFINE LinkedIn account) inbox on the social media platform.

The subscription process is straightforward and efficient. The followers that REFINE has already gained on its LinkedIn account were automatically invited to subscribe to its newsletter upon creation, creating a fully opted-in list that is GDPR compliant and does not require the collection of email addresses. Any new followers can subscribe by clicking the newsletter subscribe button on our profile. Additionally, we can also directly invite followers to subscribe and share a post including the link to subscribe. Anyone who wishes to unsubscribe can do so at any time via the REFINE LinkedIn profile.

LinkedIn favours content that people engage and interact with, so the more interest the REFINE newsletter generates and the more people interact with it through likes, shares and comments, the more likely the LinkedIn algorithm is to share the content with people beyond the project's already established followers (Wilson, 2022). The newsletter also helps to drive traffic to the REFINE website by including links within its content.

Each project newsletter is also linked on the REFINE website under [Newsletter](#) to maximise the communication potential for each issue and increase subscribers. All

information developed for the newsletter is in line with the REFINE Brand Strategy and other communications outputs both online and offline, therefore making use of the key messaging already developed.

The REFINE Newsletter has been issued bi-annually throughout the project. The REFINE newsletter currently has 116 subscribers and three (3) newsletter issues. We additionally issued three (3) on our previous platform MailChimp making 6 issues in total.



## REFINE Newsletter #2: WSED 2023

REFINE  REFINE Project  
276 followers

March 2, 2023

Hello and welcome to issue two of the REFINE newsletter 🌟

Ahead of the project's final event tomorrow, we come to you with a special feature on the [World Sustainable Energy Days 2023 \(WSED\)](#) which are taking place in Wels, Austria - a key event in the [#eneravefficiencv](#) calendar!

 Like  Comment  Share

 7

Figure 7: REFINE LinkedIn Newsletter #2

### TRADITIONAL AND DIGITAL MEDIA

Media is an important audience, as well as being a multiplier channel to reach other priority audience groups. Two (2) press releases have been issued by M36 as well as one (1) media invitation. REFINE has also been featured on twenty-eight (28) online/national news sites including Insider Greece, Poslovni Dnevnik, Viba and Energy Press.

REFINE's objective for media coverage is to target a broad audience and inform them about EES, possibility of refinancing of projects and to highlight the European activities of national partners. A crucial element to achieving this goal is the creation of a list of media outlets at both an EU and national level relevant to REFINE. A European level media list, as seen in Annex 3 has been created by CARR and partners have determined relevant channels on a national basis. These consist of both general media outlets and those with a specific relevance to the REFINE project (energy, finance, science and research etc.).

For TV/radio coverage the DOA states that REFINE should achieve “*where applicable TV and radio spots informing about the general project aim will be broadcast in cooperation with local or national broadcasters to inform the general public about the topic.*”. No appropriate TV or radio opportunities were identified by M36, but the key stakeholder groups were reached through a range of other digital means instead.

## **SOCIAL MEDIA: TWITTER**

[@REFINE\\_Project](#)

Twitter is an important tool for the communication of H2020 projects as most projects have a Twitter account and it is a popular platform for both individuals and businesses. For the REFINE project, hashtags such as #EnergyNews, #EnergyEfficiency, #Refinancing, #EnergyUnion, #EUGreenDeal and #REPowerEU were identified as relevant for the REFINE project and have helped to amplify the project and connect it with relevant audiences.

The REFINE Twitter channel primarily functions as a platform for raising awareness about the project and its progress among key stakeholders, interacting and building relationships with them and disseminating project news and results as well as interesting news in relevant fields. It has gained a lot of attraction in year two and three of the project.

As numerous other EU funded projects operating in the same energy efficiency landscape also have a visible Twitter presence, we cross-promote each other's updates and gain invaluable insights from each other. Following the Twitter profiles of prominent actors sharing news on topics such as energy efficiency services and refinancing schemes in general has helped us to keep up to date with the latest developments in the field.

Many REFINE partners are avid Twitter users, and they share their own relevant posts and retweet REFINE content, hence acting as multipliers amplifying the REFINE messages among a broader audience. The REFINE Twitter account has 586 followers at M36.



Edit profile

### REFINE Project

@REFINE\_Project

REFINE is a #H2020 research project seeking to improve the supply of sufficient and attractive financing sources to #energyefficiency investments. #EURResearch

[refineproject.eu](https://refineproject.eu) Joined August 2020

699 Following 588 Followers

Tweets Replies Media Likes

Pinned Tweet

REFINE Project @REFINE\_Project · Jul 22, 2022

What does REFINE mean for #energyefficiency service providers & financial institutions?

◆ EES providers can sell receivables to be paid by their client to the

Figure 8: REFINE Twitter account

## SOCIAL MEDIA: LINKEDIN

### [REFINE Project](#)

LinkedIn as a platform reaches a more professional audience has been crucial for reaching out to members of organisations that REFINE wishes to engage with (professionals involved in the energy efficiency and financial sectors). The content shared via LinkedIn has been the same as that shared on Twitter however, some posts were adapted as necessary. For example, some posts were posted in a longer format on LinkedIn given its ability to include more characters in a post.

The REFINE LinkedIn page gives members access to relevant information and provides them with an opportunity to make business contacts, post comments, and establish themselves as industry experts. It is therefore a key platform for REFINE communication, dissemination and exploitation activities. The project website that links to LinkedIn will stay alive for 5 years after the end of the project, until May 2023.

The LinkedIn page is set up as a company page (as opposed to a profile or a group) as it offers us the appropriate ways to promote our project and engage with our audiences. It serves as an area to share project and partner updates, industry news, behind-the-scenes work, celebrate achievements and link to the latest website posts. The page portrays the REFINE voice and shares voices of individuals. The LinkedIn icon is displayed at the bottom of the project website. The LinkedIn page

is therefore easily found by anyone interested in the project and its outputs, and the threshold to follow the page and like and share posts is low.

As stated in the DoA, “Monthly orchestrated social media posts on the progress, interim results and events will be published and shared by the social media accounts of consortium partners. The objective is to keep a broad stakeholder audience informed about the project progress.” Regular updates of the REFINE Twitter and LinkedIn platforms have been consistent throughout the project’s lifetime, amplifying the research, events and results of the REFINE project and engaging with key audiences. REFINE LinkedIn has 276 at M36.

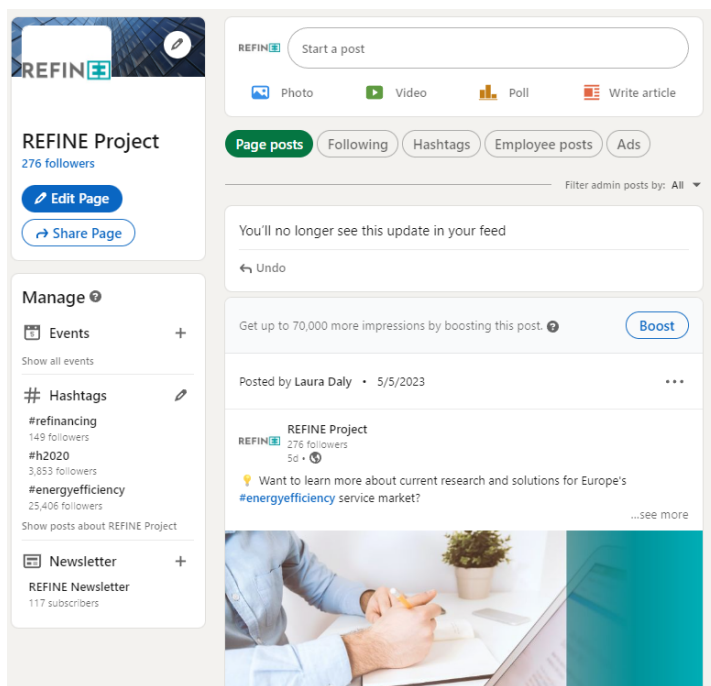


Figure 9: REFINE LinkedIn Account

## SOCIAL MEDIA: FACEBOOK

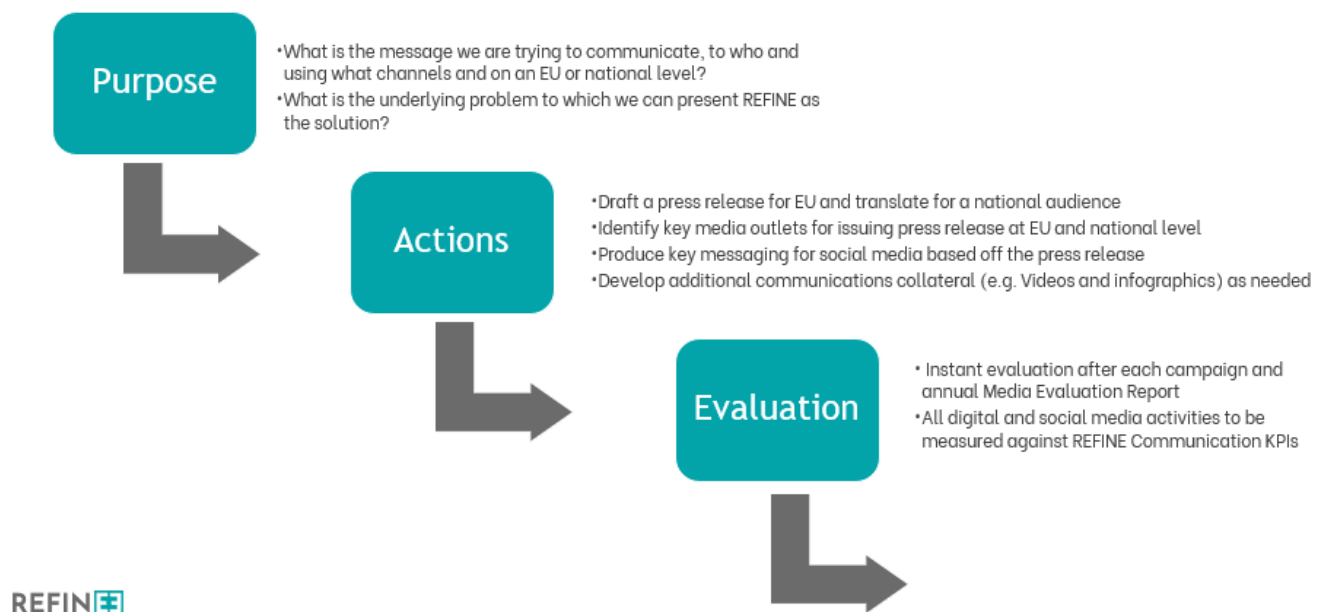
After careful consideration, consultation with partners and an internal analysis of the audience reach in terms of the different digital platforms, the dissemination team decided to exclude Facebook from the range of channels for reaching the REFINE audiences. Other dissemination channels, including Twitter and LinkedIn have proved to be more effective in other related projects. There are, however, some exceptions. Even though REFINE does not use Facebook on a project level, certain partners, HMRS in particular, outlined that they typically connect with their audiences in Ukraine through Facebook and where possible, they used it as one of their local communication and dissemination channels.

## SOCIAL AND DIGITAL MEDIA STRATEGY

As mentioned above, the two social media platforms which have been identified as most pertinent to the REFINE project are Twitter and LinkedIn. The strategy we

apply to social media is based on 3 pillars - **Purpose, Actions and Evaluation**. The social media strategy is discussed in more detail in D6.4 Dissemination and communication strategy. **As the project has developed and REFINE has gathered an audience on social media, we moved from focusing on growth to brand awareness and engagement to ensure we are aiming for impact when communicating the project via our social media channels.**

In the final months of the project, our strategy and content has focused on targeted engagement with our established audiences and promotion of the REFINE tools and solutions. Examples of these posts can be seen in Figure 11.



REFIN  **Figure 10: Three pillars of REFINE Social and Digital Media Strategy**



Figure 11: REFINE Social Media Content

# 4 DISSEMINATION STRATEGY AND ACHIEVEMENTS FROM M19-M36

## 4.1 Overview

The Dissemination Plan for REFINE seeks to guide the project's dissemination outputs throughout the project and beyond.

### 4.1.1 Dissemination objectives

*What do we want from REFINE dissemination?*

To put it very simply, the primary objective for the dissemination of REFINE is to ensure that all results are made available to relevant stakeholders, and that the reasons for the results being of interest, benefit and relevance to them is communicated effectively. This in turn facilitates exploitation and take-up of the results by end-users.

Specific objectives include:

- To increase knowledge of the REFINE project and the role it will play in the energy efficiency sector
- To improve the acceptance by key stakeholders in the energy efficiency and refinancing sectors of the overall concept of refinancing for EES projects
- Encourage the adoption of the REFINE project outputs by target audiences in refinancing and energy efficiency.

### 4.1.2 Dissemination audience

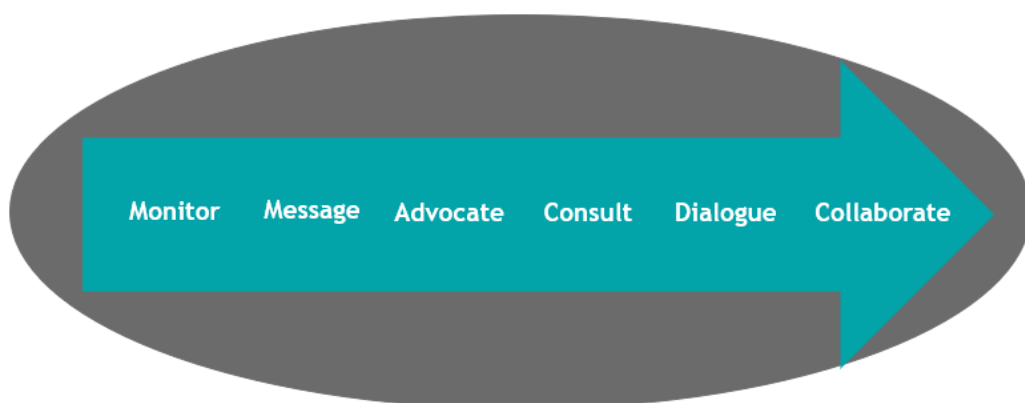
*Who are REFINE disseminating information to?*

Key stakeholder groups include:

- Energy efficiency service providers, refinancing institutions, guarantee funds, market facilitators and banking associations at both a European and national level.
- REFINE-related audiences - partners, Advisory Board and participants in expert interviews, stakeholder workshops, training and webinars.
- Examples at a European level include the European Investment Bank (EIB), European Investment Fund (EIF), European Energy Efficiency Fund, DWS Group, European Banking Association (EBA), European Banking Federation (EBF).

See Annex 1 Communication and Dissemination Strategy grid and Annex 2 Stakeholders for details on the target audience groups.





**Figure 12: 6 Steps to Effective Stakeholder Engagement**

The REFINE stakeholder engagement strategy is a six-step process for ensuring meaningful engagement with REFINE’s target audiences and for the development of strategic partnerships. These steps are discussed in detail in D6.4 Dissemination and communication strategy. In M19-M36, this strategy has played a key role in the establishment of the REFINE pilot applications with external stakeholders.

REFINE also sought cluster opportunities with other projects to share lessons learned and build synergies in research (Annex 4), this was in addition to the activities that took place with stakeholders on a European and national level and those close to the project e.g., Advisory Board members.

### 4.1.3 Dissemination methods

*How will we carry out REFINE dissemination activities?*

We carry out dissemination activities for example through:

- Direct engagement with project stakeholders - carrying out of expert interviews, stakeholder workshops, training events and webinars
- Presentations at conferences and industry events relating to energy efficiency and refinancing
- Articles written by partners for academic conferences and to be published in peer-reviewed scientific journals
- Access to the Deliverables published on the REFINE website

The above-mentioned dissemination methods are discussed in more detail in the dissemination channels section below.

#### 4.1.4 Dissemination messages

*What is REFINE saying in its dissemination outputs?*

The key messages for dissemination will depend on the content which has been produced but will be streamlined according to relevance to the project's key stakeholders. Key messages include:

- REFINE is collecting research from across Europe and developing solutions which will transform the future of investments for energy efficiency projects
- REFINE will work with partners from business, finance and the energy efficiency to improve the supply of financing sources for energy efficiency investments.

The key messages are presented in more detail in D6.4 Dissemination and communication strategy and will evolve as results are generated.

#### 4.1.5 Dissemination channels

*Through what channels is REFINE going to disseminate?*

This section covers the primary dissemination channels used to share project results and updates with key stakeholders. Several of the channels presented as communication channels above also serve as dissemination channels (website, newsletters, traditional and digital media). Other key channels, such as conference and industry events, academic journals, dissemination material and direct interaction with stakeholders and through strategic partnerships are presented below.

##### EVENTS

By M36, the REFINE partners have participated in and represented the project at forty-seven (47) events in total. These events included conferences and training sessions and had approximately 1,650 attendees in total. The events provided opportunities for REFINE partners to present their research and promote REFINE to relevant target audiences as well as to discuss project synergies and collaboration across H2020 projects. They include both project events and external events i.e., events organised by REFINE partners and events attended by REFINE partners. A list of events attended by REFINE partners since M1 is included in Annex 5.

The REFINE events aim to raise awareness among the targeted groups, analyse project activities, establish personalised interactions and provide project partners with inputs from target stakeholders to improve the REFINE solutions. By attending external events, partners aim to raise awareness among key stakeholders and facilitate knowledge sharing, thus increasing the project impact. One of these events included the REFINE Final Event in M34. In collaboration with the [FinEERGO-Dom project](#), REFINE hosted a roundtable workshop at the World Sustainable Energy

Days 2023 in Wels, Austria - a key event in the energy efficiency calendar. Further details are included in *D6.7 Proceedings from REFINE Final Event*.

Presentations at conferences and industry events of the financing sector and ESCO sector constitute key activities for awareness raising of the REFINE project and of the outcomes of project activities. All partners completed their efforts towards events in the project's dissemination monitoring tool with information about their participation at conferences and available presentations are shared via the REFINE website to ensure that relevant information is disseminated to as broad an audience as is possible.

## PUBLICATIONS

Two (2) peer-reviewed REFINE papers have been published by M36: '*Market growth models for energy efficiency financing*' authored by Leutgöb, K. et al. published by the European Council for an Energy Efficient Economy (ECEEE) [here](#) and '*Opportunities and challenges of energy performance contracting in the Italian market for energy efficiency services*' by Patrick Maurelli et al. published by the IOP Conference Series Earth and Environmental Science [here](#).

Journal publications on the (interim) results of the project and experiences from the pilot applications serve as important dissemination outputs of the project as they will be able to describe in detail the current issues faced on refinancing in the energy efficiency sector and the solutions which are in development as part of the REFINE project. These articles are open-access in line with the Grant Agreement and are published on the REFINE website and shared to key stakeholders via social media channels and the REFINE newsletters.

Public (non-confidential) deliverables are uploaded to the project website in the REFINE Knowledge Centre.

## DISSEMINATION MATERIAL

In the first half of the project, we produced a range of digital and printed communication material which also serves as dissemination material. See the section on communication material for details. The dissemination team remained at the disposal of the consortium throughout REFINE and encouraged partners to request additional dissemination/design material when the need arises.

## DIRECT ENGAGEMENT

Targeted engagement has been central with identified stakeholders at both a European and national level by M18:

- Two (2) EU-wide stakeholder workshop have been hosted (November 2021 and June 2022);
- Partners have hosted twenty-six (26) national stakeholder workshops each (see section 5);

- Partners held 30 expert interviews in total with key organisations in the energy industry across partner countries (see D2.3 for details).

Networking form an integral part of the direct engagement efforts. By interacting with key stakeholders at events and through initiatives, we can disseminate project results effectively, cross-fertilise ideas and concepts and share insights and best practices. Stakeholders can become amplifiers of our messages, which also supports our exploitation efforts. Additionally, REFINE created strategic partnerships with various similar projects and engaged in clustering activities both online and offline. A list of these projects can be seen in Annex 4.

## 4.2 Compliance and obligation to disseminate results

CARR has been maintaining a record of all dissemination activities carried out throughout the lifetime of the project. All partners reported any dissemination actions to CARR, either through the project monitoring tool or by email. Reported dissemination details feed into dissemination activities across our platforms.

Informed consent is always obtained from external individuals taking part in dissemination activities, such as interviews, photos and videos, and compliance with the General Data Protection Regulation (GDPR) is ensured. For details on the management of data, see D1.8 and D1.9.

As laid down in article 29 of the Grant Agreement (GA) [4], each beneficiary must, unless it goes against their legitimate interests, as soon as possible disseminate its results by disclosing them to the public by appropriate means (other than those resulting from protecting or exploiting the results), including in scientific publications (in any medium).

Dissemination has been guided by section 8.4 of the Consortium Agreement (CA) [3]. The main principle is that prior notice of any planned publication shall be given to the other parties at least 45 calendar days before the publication. Any objection to the planned publication shall be made in accordance with the Grant Agreement in writing to the Coordinator and to the Party or Parties proposing the dissemination within 30 calendar days after receipt of the notice. If no objection is made within the time limit stated above, the publication is permitted. An objecting Party can request a publication delay of not more than 90 calendar days from the time it raises such an objection.

## 4.3 Open access to scientific publications and research data

All REFINE publications are open access. Our open access approach ensures that the results of our research contribute invaluable knowledge into the energy marketplace. Our ability to reconcile an open access approach for data and results generated with the business interests of the participating industry has the potential

to offer a successful case study in terms of knowledge management for future projects.

As stated in the EC Guidelines to the Rules on Open Access to Scientific Publications and Open Access to Research Data in Horizon 2020 (European Commission 2017) [2], open access (OA) refers to the practice of providing online access to scientific information that is free of charge to the end-user and reusable. 'Scientific' refers to all academic disciplines. In the context of research and innovation, 'scientific information' can mean:

1. peer-reviewed scientific research articles (published in scholarly journals) or
2. research data (data underlying publications, curated data and/or raw data).

'Access' refers not only to basic elements such as the right to read, download and print, but also the right to copy, distribute, search, link, crawl and mine.

The EU wants to improve access to scientific information and to boost the benefits of public investment in research funded under Horizon 2020. Granting access to scientific publications and data helps to:

- build on previous research results (improved quality of results)
- encourage collaboration and avoid duplication of effort (greater efficiency)
- speed up innovation (faster progress to market means faster growth)
- involve citizens and society (improved transparency of the scientific process).

REFINE publications are made available through the project website, and one of the following two practices of open access is followed (evaluated on a case-by-case basis):

1. Self-archiving / 'green' open access - the author, or a representative, archives (deposits) the published article or the final peer-reviewed manuscript in an online repository before, at the same time as, or after publication.
2. Open access publishing / 'gold' open access - an article is immediately published in open access mode. In this model, the payment of publication costs is shifted away from subscribing readers. The most common business model is based on one-off payments by authors/partners.

The legal basis for open access is laid down in the rules for participation in H2020 (1290/2013/EU) [5].

#### 4.4 Acknowledgment of EU funding

REFINE uses the European emblem (flag) in all dissemination materials to acknowledge the support received under the H2020 programme. The emblem is

associated with the following sentence: “This project has received funding from the European Union’s Horizon 2020 research and innovation programme under grant agreement No 894603.”, or for results: “The research leading to these results has received funding from Horizon 2020, the European Union’s Framework Programme for Research and Innovation (H2020/2014-2020) under grant agreement no 894603”.

The typeface to be used in conjunction with the EU emblem can be any of the following: Arial, Calibri, Garamond, Trebuchet, Tahoma, Verdana. The minimum height of the EU emblem shall be 1 cm, and the font size used should be proportionate to the size of the emblem. More details on size, colour, positioning etc. are available in the European Commission’s (2012) handbook ‘The use of the EU emblem in the context of EU programmes - Guidelines for beneficiaries and other third parties’ [1].

As for scientific publications, the bibliographic metadata must be in a standard format and must include all the following:

- the sentence ‘The research leading to these results has received funding from Horizon 2020, the European Union’s Framework Programme for Research and Innovation (H2020/2014-2020) under grant agreement no 894603’;
- the name of the action, acronym and grant number;
- the publication date, and
- a persistent identifier.

# 5 COUNTRY-SPECIFIC AND CONSORTIUM-LEVEL ACTIVITIES AND FUTURE PLANS

This section focuses on presenting the achievements to date at a country - specific and consortium-level as well as any future plans for all partner countries beyond the project end. The general communications approach of each country is presented in D6.4 Dissemination and communication strategy.

A record of each of the activities listed below is recorded in the REFINE Dissemination Monitoring Tool. A contact list of all the participants is maintained internally by the relevant partners in compliance with the GDPR.

All partners have involved stakeholders as part of the project's pilot application and expert interview processes. The pilot applications process is recorded in D4.4 and the interview process is recorded in D2.3 and therefore not elaborated on here.

## 4.5 Austria

### ACHIEVEMENTS TO DATE (M19-M36):

- 2 stakeholder workshops held (Part of WP3)
  - First stakeholder workshop June 2021, 16 participants
  - Second stakeholder workshop October 2021, 22 participants
- Increased use of social media activities (LinkedIn) to network with interested stakeholders (with focus on financial institutions)
- Second project newsletter issued (12<sup>th</sup> December 2021)
  - Successful deliveries: **1072**
  - Total opens: **203**
- Third project newsletter issued (23<sup>rd</sup> March 2022)
  - Successful deliveries: **1059**
  - Total opens: **213**
- 3 pieces of media coverage achieved from press release issued in September 2021:
  - HLK.co.at:  
<https://hlk.co.at/gebaeudeloesungen/energiefinanzierung-und-gebaeudesanierung/>
  - top-news.at  
<https://www.top-news.at/2021/09/02/eu-projekt-zielt-darauf-ab-eine-bessere-finanzierung-fuer-energieeffizienzprojekte-bereitzustellen/>

- wiesonur.de  
<https://wiesonur.de/2021/09/02/eu-projekt-zielt-darauf-ab-eine-bessere-finanzierung-fuer-energieeffizienzprojekte-bereitzustellen/>
- Presentations:
  - “Neue Förderung von Contracting durch Haftungen / staatliche Garantien” (Winfried Braumann - Subcontractor e7), 07.04.2022, 1st National Roundtable on financing energy efficiency in Austria
  - “Mainstreaming of refinancing schemes”, 24.05.2022, Sustainable Energy Investment Forums - National Roundtable on Financing Energy Efficiency in Slovenia
  - “The role of re-financing in the implementation of energy efficiency projects in the public sector”, 09.06.2022, eceee summer study
  - “Financial barriers to the growth of the ESCO industry - and how to overcome them”, 05.10.2022, European ESCO Conference 2022
  - “Finanzierung von Investitionen in die Dekarbonisierung des Gebäudesektors - Welche Rolle können Energiedienstleister spielen?”, 05.10.2022, DECA - 3. Österreichischer Energieeffizienzkongress
- e7 continued to increase its network with stakeholders from financial institutions via LinkedIn.
  - Invited 20 people to connect with the REFINE LinkedIn page
  - Interacted with them and sent them REFINE News
- Papers published:
  - ECEEE paper: [https://refineproject.eu/wp-content/uploads/2021/08/REFINE\\_eceee\\_paper.pdf](https://refineproject.eu/wp-content/uploads/2021/08/REFINE_eceee_paper.pdf)
- Five blog posts on the REFINE website
- Existing social networks have been mobilised and new networks (especially within the financial sector) have been created (directly addressed through social channels)
- Energy Efficiency Service Providers further reached:



- Bilateral contacts and the contributions from DECA (Association of Austrian providers of Energy Efficiency Services and Contracting Services) have been used as local communication channels
  - EES providers have been invited to join the discussion process and stakeholder workshops.
- Financial institutions:
    - Qualified contacts with financial institutions have been strengthened
    - Bilateral contacts have been used to reach out to interested financial institutions (e.g., addressing the sustainable finance department of commercial banks) putting a focus on the business opportunities connected with EES refinancing models. For this purpose, a short briefing addressing the use of refinancing schemes and the REFINE project for financial institutions, has been drafted.
    - Social media activities (mainly LinkedIn) have been carried out, addressing directly the relevant departments in financial institution
  - Other stakeholder groups:
    - Ad-hoc bilateral meetings and conference calls with the representatives of the other target groups (facilitators, associations, possible providers of public guarantee funds) have been held.

#### FUTURE PLANS (M36 AND BEYOND):

- The dissemination and communication efforts will be extended using a variety of communication channels:
  - Social media channels (mainly through the LinkedIn-page of e7)
  - Relevant media (3 press releases, 3 pieces of media coverage, 4 newsletters per partner in total)
- Publishing papers in reviewed scientific journals
- The dissemination channels of DECA will be used mainly for access to EES provider (press releases, newsletter, etc.)
- Two (2) training events with around 20 participants per training will be executed as part of WP5. The selected target groups receive a clearer picture on financing difficulties of energy efficiency service projects, refinancing instruments and their application, and will be addressed with follow-up information

- Promotional webinars (2) will be implemented to enable an easy access to the refinancing topic (in addition to the capacity building webinars planned in WP5).
- Attendance and, wherever possible, presentation of the outcomes of the REFINE at relevant conferences and branch events.
- Networking and engagement with key stakeholders

## 4.6 Croatia

### ACHIEVEMENTS TO DATE (M19-M36):

- First workshop held in October 2022 for representatives of EES provider, 4 participants
- Second workshop held in November/ 2022 for representatives of EES provider, 7 participants
- Third workshop held in February 2023 for representatives of financial institution, 28 participants
- Fourth workshop held in February 2023 for representatives of financial institution, 20 Participants
- Fifth workshop held in February 2023 for representatives of financial institution, 24 participants
- Sixth workshop held in May 2023 for representatives of financial institution, 21 participants
- Seventh Workshop held in May 2023 for representatives of financial institution, 12 participants
- Media coverage: 4 articles published from press release issues
- Gave presentation on Refinancing energy services - green funding opportunity - in Barcelona at ETU Initiative Conference - How can we support your energy transition (March 2022)
- Gave a presentation of REFINE project and outputs in City storage & sector (CSSC lab) - advanced training (October 2022)

- Gave a presentation titled “Modeli financiranja/refinanciranja energetske usluga izgradnje postrojenja OIE putem ESCO/PPA modela“ at the online training/workshop event - “Energetska obnova višestambenih zgrada: Prepreke, rješenja i mogućnosti” in February 2023. This event was aimed at stakeholders in energy refurbishment of multiapartment buildings with over 500 participants
- Gave a presentation titled „Projekti REFINE i PVMax: Modeli refinanciranja izgradnje sunčanih elektrana“ at event “Energetska tranzicija PGZ u EU perspektivi 2021-2027.” in February 2023
- Presented REFINE project at C4LA Launch Conference - Tracing the route for a common work in Tirana in March of 2023.
- Bilateral meetings and telephone calls have been carried out with identified main stakeholders mostly financial institutions to set up training events and follow up activities

#### FUTURE PLANS (M36 AND BEYOND):

- Project outputs will continue to be disseminated using REGEA’s social media channels, such as LinkedIn and/or Facebook.
- Project outputs will be further disseminated and used in other Horizon 2020 and EU projects where REGEA is participating such as SMART EPC project where REGEA as a project coordinator and task leader in developing standard EPC contract draft is promoting refinancibility of project and ManagEnergy initiative where REGEA is partner of implementing consortium and in charge of delivering module on financing of EES projects.
- Further collaboration with financial institutions is planned to provide facilitation services, further focused trainings and workshops as well as help financial institutions in development of new financial instruments for EES projects.
- Project outputs to be further disseminated and used in development of EPC market in Croatia where REGEA will use its outputs in EPC project development.
- Identifying relevant initiatives on national and international level and collaborating with them to achieve wider reach of project outcomes and knowledge base.

## 4.7 Czechia

### ACHIEVEMENTS TO DATE (M19-M36)

- REFINE website translated for news
- Short articles added to the website
- The second and third newsletters have been circulated.
  - While the second newsletter has been based on the English version with additional information tailored to attract Czech ESCOs, the third newsletter focused on providing Czech stakeholders with information very specific for the Czech market and activities of REFINE in Czechia
- Media coverage - 2 press releases
  - June 2022: Press release: Energy services reduce energy costs in public buildings without the need for capital investment. About implementation of such projects you will hear at the seminar in mid-June.
  - October 2022: Press release: Major EU-funded REFINE project launches novel solutions for Europe's energy service providers as crisis deepens
  - May 2023: Press Release: Save with energy services in combination with subsidies
    - The press release was sent to 6000 subscribers of the Czech News Agency (CTK) news services. That means it is received by journalists from almost all Czech media with a large number of subscribers from governmental authorities and corporate segment.
- Articles
  - October 2022: Sale of receivables from Energy Performance Contracting projects in the Czech Republic - a best practice example. Published in EPC Code of Conduct 9th Newsletter issued by the European EES Association, eu.ESCO and EFIEES
  - January 2023: The Tripartite Agreement allows the resale of receivables even for subsidised energy service projects with a guaranteed outcome Published in News at SEVEN which was sent to 500 Czech stakeholders and about 100 stakeholders across the EU interested in EPC.
- Blog post published in June 2022: **The tripartite agreement enables the sale of receivables for subsidized EPC projects in the Czech Republic**
  - <https://refineproject.eu/2022/06/28/tripartite-agreement-czechia-blog/>
  -
- Seven presentations at conferences and industry events:

- Nice / France (08/09/22) Sale of Receivables from Energy Performance Contracts in Czechia. Best Practice Example. Sustainable Places Conference
  - Starosel /Bulgaria (27/09/22) National roundtables in CZ and SK further development of ESCO market and EPC. BeSmart National Conference: Sustainable financing of energy efficiency and RES projects
  - Web-conference (25/10/22): Sale of Receivables from Energy Performance Contracts in Czechia. Best Practice Example EPC Code of Conduct Administration Meeting Q3 2022 organised by the European EES associations eu.ESCO and EFIEES
  - Prague /Czechia (26/10/22): Guidelines for EPCs subsidised from the State Environmental Fund APES Council Meeting (Association of energy service providers)
  - Sofia - Hybrid/Bulgaria (23/11/22): Comprehensive Renovations in Czechia: combining energy performance contracting with subsidies. Regional Investment Roundtable: Scaling Energy Efficiency Investments in Multifamily Buildings
  - Warsaw /Poland (6/12/22): Multisource financing of ESCO projects: combining energy performance contracting with subsidies. Energy Efficiency Projects Realised by ESCOs with Support from PRP
  - Bratislava / Slovakia (27/4/23): Large Scale Projects in the Czech Republic. Roundtable of Smart Finance for Smart Buildings.
- In the Czech Republic, the following main stakeholder groups were being addressed by the dissemination and communication activities:
    - Energy Efficiency Service Providers and Association of the providers
    - EES Facilitators
    - Private financial Institutions (Refinancing Institutions) and Public funds (State Environmental Fund (SEF) and Czech Development Bank)
  - SEVEn co-operated closely with with the APES, Czech Development Bank and SEF when organising events. Months of negotiations and co-operation with SEF were needed to fit the EPC project in the public scheme rules.
  - The Local Dissemination Plan consists of the following activities:
    - Active engagement and networking with key stakeholders to form or employ strategic partnerships
    - Bilateral meetings, telephone and online calls with members of target groups.
    - Dissemination of information on the project, organised events and results to the target groups via e-mail, social media (LinkedIn and

Facebook) and by publishing to the REFINE website. Invitations to events were also published in the newsletters.

- Press releases before or after important events or milestones of the project (e.g., stakeholder workshops, training events, successful pilot application) targeting the audience of main stakeholder groups.
- Existing social networks have been mobilised and new networks have been created.
- Collaboration with national and international professional portals and media operating in the area of energy efficiency established in the first half of the project was further employed.
- Relevant national conferences and seminars have been identified.
- Efficiency service providers and facilitators:
  - SEVEN continued to co-operate closely with the Czech Association of energy service providers (APES) which are very useful in disseminating information among its members who are both EES providers and facilitators and involving them in REFINE activities. APES was involved in work on the amendments to the Guidelines of the State Environmental Fund, so combination of subsidies with sale of receivables was possible
  - This is supported by the direct contacts between SEVEN and the Czech ESCOs, especially those who are not a member of APES. In the second half of the project, ESCOs have been involved especially in the four trainings.

#### **FUTURE PLANS (M36 AND BEYOND):**

- Financial institutions:
  - SEVEN has already established good contacts with two Czech banks who are purchasing the receivables from the EPC projects in Czechia. SEVEN will strive to establish new bilateral contacts with other financial institutions who might be interested in establishing refinancing schemes in the future.
  - It will be also key to continue in collaboration with the State Environmental Fund (SEF) who provides subsidies for the EPC projects. Collaboration will follow up the existing good contacts with the responsible persons in the SEF.



## 4.8 Latvia

### ACHIEVEMENTS TO DATE (M19-M36):

- Second workshop held in December 2021, with approx. 10 participants
- A blog piece has been written: <https://refineproject.eu/2021/11/16/benefits-of-the-beef-model-the-latvian-case/>
- Three press releases translated and published with a total of 5 media coverages
- 6 newsletters translated and published
- The dissemination plan for F3 consists of both international engagement and dissemination in terms of investors and EES providers for investment and implementation under the BEEF scheme, and national in Latvia, in terms of developing pilots, where LABEEF already exists.
- Internationally, the two main stakeholder groups identified as the most relevant for F3 are:
  - Investors
  - Energy Efficiency Service Providers
- Conversations have been had with EIB, EIF, EBRD, Social Development Bank and 2 international sustainable investors for investment into LABEEF as well other BEEF type facilities developed in countries represented in the REFINE project.
- In terms of EES providers, conversations have taken place with some of the international players such as ENGIE, SIEMENS, VINCI as well as some local EES providers e.g. InvEsco and Energy Data
- Local dissemination activities that have been carried out in Latvia include:
  - Bilateral meetings, telephone and online calls with members of target groups.
  - Dispatch of information to the target groups via e-mail.
  - Dissemination of outcomes of the project using own social media channels including LinkedIn and Twitter.
  - Press releases before or after important events or milestones of the project (e.g., stakeholder workshops, training events, successful pilot application) targeting the audience of main stakeholder groups.
  - Attendance and, wherever possible, presentation of the project's progress at relevant local and national workshops, seminars and conferences.
  - Identifying relevant initiatives on national level and collaborating with them to achieve wider reach of project outcomes and knowledge base.

#### FUTURE PLANS (M36 AND BEYOND):

- F3 will continue to support partners in the dissemination activity for possible implementation of a BEEF alike facility in their own countries
- F3 will continue to disseminate and support the REFINE tools where applicable
- Creara will continue to integrate REFINE tools when advising its network and audiences including ESCOs and FIs in the development of their financial activities

#### 4.9 Spain

#### ACHIEVEMENTS TO DATE (M19-M36):

- Second stakeholder workshop held on the 11/01/2022 with 31 participants
- Participation on behalf of REFINE in the Rehabilitating Forum in Sevilla, Spain on the 07/08/2022
- Translation of the REFINE website into Spanish
- Retweeting and sharing REFINE post in Creara's social media channels
- Posting the REFINE newsletter across social networks
- Collaboration with ANESE aimed at training ESCOs in refinancing and dissemination of project results
- Mobilising stakeholders to participate in the Second Advisory Board Meeting
- Organisation and execution of 10 training events for ESCOs and FIs interested in implementing refinancing in their operations
- Utilising and supporting the main communication tools: project website, project leaflet, conclusion reports developed by partners, communication events, workshops and training sessions, Bankia and CREARA communication channels (website, social networks, digital press).

#### FUTURE PLANS (M36 AND BEYOND):

- Creara will continue to disseminate and support the REFINE tools where applicable

- Creara will continue to integrate REFINE content when advising both ESCOs and FIs in the development of their financial activities

#### 4.10 Ukraine

##### ACHIEVEMENTS TO DATE (M19-M36):

- First workshop held on December 20, 2021, 14 participants
- Second workshop held on February 4, 2022 - 10 participants
- First newsletter has been sent out in December 2021
- Website translations have been finalised
- Facebook used successfully as a dissemination channel
- The main stakeholder groups have been identified:
  - Energy Services Providers and its associations,
  - Financial Institutions;
  - Representatives of local and central government responsible for policies and procurement of Energy services
  -
- Capacity building activities: 3 training events (including 1 webinar) with the main stakeholders conducted in January March 2023

##### FUTURE PLANS (M36 AND BEYOND):

- Bilateral meetings, telephone and online calls with members of target groups.
- Dissemination of outcomes of the project using HMRSC own website and social media channels such as Facebook
- Dispatch of important project information to the target groups via e-mail
- Organization of workshops and seminars for the target groups to present project results, project materials and project progress information and plans to the target groups
- Attendance and, wherever possible, presentation of the project's outcomes at relevant local and national workshops, seminars and conferences
- Following up with the State institutions, National Association of ESCO companies and international donor organisations on relevant initiatives on national level and collaborating with them to achieve wider reach of project outcomes and knowledge base.

- Support of the State Government and Financial Institutions in development of affordable financial products for ES providers to increase ES market development.

#### 4.11 Italy

##### ACHIEVEMENTS TO DATE (M19-M36):

- Third workshop (Horizontal) saw the participation of the President Stefano Besseghini of the Italian Regulatory Authority for Energy, Networks and Environment (ARERA) carries out regulatory and supervisory activities in the sectors of electricity, natural gas, water services, waste cycle and district heating.
- The translation of the REFINE website into Italian is complete
- Identifying synergies with various similar projects such as the ReeStart project where Federesco is currently a consortium member
- Key Stakeholders have been identified:
  - Energy Efficiency Service Providers, mainly ESCOs selected among the associated partners of FEDERESCO and EES providers that show interest in Refinancing Mechanism and instruments, Clients of EE services, Financial Institutions (Banks, Insurances, Equity Funds), Public institutions and policy makers (GSE - Energy Services Authority, MISE - Economic Development Ministry, ENEA), Market Facilitators, Advisors and experts, Guarantee Funds (INVITALIA as public entity, other private funds to be identified), Other stakeholders (Banking Associations, Rating or Certifying Agencies)
- Periodic news published in the Federesco Website with 14 newsletter on FEDERESCO web site (<https://www.federesco.org/it/new-view.php?id=668> )
- Activity on social networks in use (managed by Federesco and by partners) promoting REFINE and its progressive outcomes
- March 1, 2023 - Federesco met with the Chairman of the Chamber's VI Permanent Finance Committee, Hon. Osnato, along with Hon. De Toma. This included discussions of energy efficiency issues in line with the REFINE project aims
- Events and Presentations:
  - FEDERESCO presented objectives and achievements of the REFINE project in different contexts. All 14 presentations have been highlighted through News and Newsletter on the official Federesco website. Some of these included:

- March 10, 2023 - Federesco hosted a meeting in collaboration with the Sports Credit Institute with their Commercial Management, Credit Management, and Special Funds Service to delve into efficiency issues, to reiterate the importance of sustainability, and to explain the most useful interventions to be adopted for sports and cultural infrastructures.
- March 22, 2023 - Presentation of the REFINE tools in the financial context by Flavio Rosa, Federesco at K.EY - The Energy Transition Expo entitled "Sport as an engine of decarbonization." Attendees included the President of GSE - Gestore dei Servizi Energetici - Paolo Arrigoni, President Claudio Ferrari of Federesco, the Ministry of the Environment and Energy Security, Ethical Guarantee, Istituto per il Credito Sportivo and AIS - Sports Facilities Association also led the discussion.
- Hosted training event on May 18<sup>th</sup> at the Cavour Congress Center - Cavour Street 50 - titled "REFINE Project: EPCs and Funding Opportunities." This was an opportunity to strengthen the Facilitation Service proposal, especially in light of the willingness of four investors to purchase EPC services from ESCOs that was discussed during the training day.
- May 18<sup>th</sup> 2023: Federesco hosted the REFINE consortium for the project's final plenary meeting aimed at finalising the project's final steps including deliverables, outputs and exploitation the REFINE results.
- Several posts have been published on social media to promote and comment on FEDERESCO's activities. With Twitter through the @FEDERESCOEnergy account and the personal accounts of the @flavios work group. The same on LinkedIn on the institutional profile and on that of Flavio Rosa.

#### FUTURE PLANS (M36 AND BEYOND):

- Activity on social networks in use (managed by Federesco) promoting REFINE and its outcomes
- Distribution of training materials on demand (digital and printed documents)
- Participation to conferences and seminars of the sector and presenting the REFINE project's outcomes where applicable
- Continue to disseminate REFINE outputs via Federesco newsletter to reach a larger audience within the mentioned target

## 4.12 Slovenia

### ACHIEVEMENTS TO DATE (M19-M36):

- Five targeted stakeholders' workshops (two financial institutions, two ESCOs, ministry in charge for energy) held in the period October - November 2021, 20 participants
- REFINE website Slovene translation was edited and completed
- The first and second REFINE Newsletters have been circulated to more than 200 addresses
- The first and second REFINE press releases have been translated in Slovene and circulated. The third national press release was prepared in April 2023 and circulated.
- Media coverage (7) - National Press Release May 2023
  - [The REFINE project provides new financial solutions for European energy service providers](#)
  - [IJS is part of the REFINE project to provide funds to energy service providers](#)
  - [REFINE - New financial solutions for European energy service providers during the deepening energy crisis \(1\)](#)
  - [REFINE - New financial solutions for European energy service providers during the deepening energy crisis \(2\)](#)
  - [Innovative Slovenian projects included in the European project REFINE](#)
  - [Energy goals - the REFINE project](#) (newspaper + digital version)
  - [Briefly from the economy - Project REFINE: How to obtain suitable sources of financing](#)
- Presentations (6)
  - Ljubljana / Slovenia (20/4/21) EPC models and financing processes in Slovenia  
LIFE Care for Climate EPC web-training
  - Ljubljana / Slovenia (10/6/2021) Financing & refinancing EPC  
LIFE C4C Consultations on buildings renovation concepts web-workshop
  - Ljubljana / Slovenia (27/10/2021) EPC models and processes in Slovenia  
LIFE Care for Climate Consultations on Financing Sustainable Buildings Renovations web-workshop
  - Stockholm / Sweden (12/10/2022) Large scale renovation (EPC)  
Concerted Actions Energy Efficiency Directive Plenary Meeting

- Ljubljana / Slovenia (9/5/2023) Financing & refinancing energy efficiency  
EUREM - European Energy Managers Training Course
- Ljubljana / Slovenia (23/5/2023) Financing & refinancing EPC Consultation on Renovation Measures and Scenarios for the National Energy and Climate Plan (NECP) in the Buildings Sector
- In Slovenia, the following main stakeholder groups were being addressed by the dissemination and communication activities:
  - Private financial Institutions (NLB, SKB, Gorenjska banka, Delavska hranilnica, Sava-RE, Triglav skladi) and public financial institutions (Eco Fund and SID Bank)
  - Energy Efficiency Service Providers
  - Ministries (Ministry for Environment, Climate and Energy, Ministry of Economy, Tourism and Sport, Ministry of Cohesion and Regional Development)
  - EES Facilitators
- JSI co-operated closely with the Ministry of Environment, Climate and Energy when organising long-term activities, policy programming and events.
- To optimize the local communication and dissemination plan and improve the effectiveness of the activities, the following approach was used:
  - Key stakeholders were identified and prioritized via thorough stakeholder analysis to identify the most influential and relevant stakeholders for REFINE project. Engaging with these stakeholders was performed in the framework of pilot projects forming strategic partnerships.
  - REFINE project tailored social media communication channels were exploited (LinkedIn, Twitter) beside standard ones (e-mails, online calls, bilateral contacts)
  - Personal interaction was enhanced: face-to-face meetings and workshops with members of focus target groups were organised. That proved to help build stronger relationships, especially with the financial institutions, foster better understanding of the project, and provide opportunities for networking and collaboration.
  - REFINE pilot projects content-driven dissemination focused on sharing valuable and relevant content related to the project's activities and results. This included informative national press release providing valuable content which generated more interest from media, helped to increase the project visibility and reach a wider audience beyond immediate stakeholders.



- Knowledge sharing and collaboration was fostered among energy efficiency service providers and facilitators by creating forums where they exchanged experiences, best practices, and lessons learned. This was achieved through consultations and trainings, enabling sharing of insights and success stories.
- Supportive energy efficiency policy and regulations advocacy was facilitated. By actively participating in policy discussions, an environment that encourages REFINE initiatives was created and supported the growth of the sector.
- Relevant national conferences and projects have been identified resulting in close cooperation with Sustainable Energy Investments Forum and LIFE IP Care for Climate project.

#### FUTURE PLANS (M36 AND BEYOND):

- To optimize the engagement of private banks and financial institutions in the design process of new financial instruments, including a refinancing scheme, the following strategies will be used:
  - Clear communication: The knowledge, benefits and design of the REFINE project refinancing schemes will be further communicated to private banks and financial institutions, highlighting how their involvement will contribute to the development of related innovative financial instruments and the potential advantages for their business.
  - Collaborative Approach: Foster a collaborative environment, initially developed by the REFINE project, by involving private banks and financial institutions from the early stages of the foreseen design process. Seek their input and expertise to ensure that the financial instruments meet market needs and align with sector standards.
  - Continuous Engagement: Maintain regular communication and engagement with private banks and financial institutions throughout the ongoing energy efficiency, renewable energy sources and renovation programmes. Provide progress updates, address any concerns, and actively seek feedback to ensure their continued interest and commitment. Explore potential avenues for future collaborations, fostering a sense of partnership and mutual growth.
- To optimize the engagement of other stakeholders the following strategy will be used:
  - Networking Opportunities: Facilitate networking opportunities among private banks, financial institutions, and other stakeholders involved in the aforementioned programmes and the REFINE project. This can include organizing working groups, events, workshops, national round tables or conferences where they can exchange and discuss ideas,

share best practices, steer financial instruments and programmes, and establish valuable connections.

#### 4.13 Greece

##### ACHIEVEMENTS TO DATE (M19-M36):

- Third REFINE newsletter sent to NCP in December 2021
- Ad-hoc interpersonal meetings, telephone calls and teleconferences with the target groups.
- Dispatch of information to the target groups via e-mail.
- Networking and engagement activities held with the following national key stakeholders:
  - The Hellenic Ministry of Energy and Environment
  - Financial Institutions (Systemic Banks and other banks)
  - The Hellenic Development Bank (potential Managing Authority for a Greek Development Fund)
  - The Energy Service Companies registered in the National ESCO Registry.

##### FUTURE PLANS (M36 AND BEYOND):

- Attendance and, wherever possible, presentation of the project's outcomes at relevant local and national workshops, seminars and conferences.
- Networking and engagement with key stakeholders sharing the REFINE methods and tools where suitable
- Regular social media activity

## 5 MEASUREMENT AND ANALYSIS

### 5.1 Monitoring communications and dissemination activities

As referred to in the description of Task 6.3 “all activities will be monitored and catalogued in the project’s monitoring tool” over the course of the project’s lifetime.

Up-to-date monitoring throughout the project has facilitated the effective tracking and planning of communication and dissemination activities for the REFINE project. Additionally, it helped with the cataloguing of key communication and dissemination opportunities and assisted the project in reaching its ambitious targets (Key Performance Indicators (KPIs)).

To facilitate the effective monitoring of communication and dissemination outputs for the REFINE project, two separate tools were developed and used. One to catalogue the communication and dissemination outputs of the project, and the other to track the progress of the KPIs.

T6.5 - Presentations at Conferences and Branch Events								
Partner	No.	City	Country	International Y/N	Date (Year-Mon)	Estimated Atten	Title of Presentation	Title of Event
Target	6 (per partner)					1,650		
Sum	6			0	5	320		
e7	1	web-conference		Y	11/6/2021	50	Market growth models for energy efficiency financing	eceee summer study
REGEA	1	web-conference		Y	2/6/2021	180	Innovative Financing for Sustainable Energy Investments: E-FIX experience in Croatia	E-Fix Final Conference
e7	1	web-conference		Y	23/09/2021	35	Guarantee instruments and refinancing schemes for the energy efficiency market first lessons from the H2020 project Refine	SEIF event
JSI	1	web-training	Slovenia	N	20/04/2021	30	EPC models and proceses in Slovenia	LIFE Care for Climate EPC Training
JSI	1	web-workshop	Slovenia	N	10/6/2021	25	Financing & refinancing EPC	LIFE C4C Consultations on buildings renovation concepts

Figure 13: Dissemination Monitoring Tool - Example view (presentations)

The Dissemination Monitoring Tools are openly available to REFINE partners through the shared workspace. They include the KPI for each relevant communication and dissemination activity of the project (presentations at conferences and branch events, articles in peer-reviewed scientific journals, press releases and project newsletters). Partners fill out separate sheets with all the relevant information about the activity, including the audience, numbers in attendance, dates and links to the material for archival and dissemination purposes.

The above allows the project to both track previous activities and to outline the steps that need to be taken for future dissemination activities to meet the relevant KPIs established in the DoA.

## 5.2 Key performance indicators

### 5.2.1 Communication KPIs

In respect of the REFINE communications KPIs, several indicative KPIs have been set in order to meet the ambitions of the project and its expected outcomes. The KPIs and success metrics related to communications are highlighted below.

Communication KPIs		Target	Status M36
Social media	Twitter	500-1,000 followers 10,000 impressions  (No specified KPI. Aim set internally by partners)	<ul style="list-style-type: none"> <li>• 594 followers</li> <li>• 69,382 impressions</li> </ul>
	LinkedIn	200-500 connections 5,000 impressions  (No specified KPI. Aim set internally by partners)	<ul style="list-style-type: none"> <li>• 286 followers</li> <li>• 18,081 impressions</li> <li>• 7,346 engagements (9.78% engagement rate)</li> </ul>
Media	Press releases	3 national releases per partner	3 per partner
	Media coverage	3 pieces of media coverage (print or digital)	42 in total
	TV/radio coverage	3 pieces of coverage on TV or radio	No coverage to date
Website and newsletter	Website	10,000 website visitors	<ul style="list-style-type: none"> <li>• 5,935 visitors</li> <li>• 8,957 page views</li> </ul>

			<ul style="list-style-type: none"> <li>• Home Page: 26% of overall views</li> <li>• REFINE Knowledge Centre: 6.5% of overall views</li> </ul>
	Newsletter	6 newsletters (2 per year)	6 published

\*See section 5 for country-specific details on status

**Table 1: REFINE Communication KPIs**

### 5.2.2 Dissemination KPIs

The metrics presented in Table 4 present the indicative, quantifiable targets against key dissemination activities for the duration of the project.

Dissemination KPIs		Target	Status M36
Conferences and events	Presentations at conferences and industry events	6 per partner	49 presentations in total
	Papers in scientific journals	1 per partner	2 papers published
Stakeholder engagement	Expert interviews	7-10 participants per country	30 participants in total (not including HMRSC)*
	Stakeholder workshops	10-15 participants per country	TBC
	Networking and engagement	1,650 stakeholders to be reached	2,990 approximately
	Capacity building activities	<ul style="list-style-type: none"> <li>• 2 training events and 2 webinars per country</li> <li>• 465 participants in training events</li> </ul>	<ul style="list-style-type: none"> <li>• 31 total training events/webinars</li> <li>• 544 total participants across training events/webinars</li> </ul>

		<ul style="list-style-type: none"> <li>• 200 participants in webinars</li> <li>• 22 financial institutions reached</li> </ul>	<ul style="list-style-type: none"> <li>• 47 financial institutions reached</li> </ul>
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Table 2: REFINE Dissemination KPIs

## 6 CONCLUSIONS

This deliverable has provided a detailed picture of the dissemination and communication landscape in REFINE. It has described the activities conducted in the second year of the project and as it comes to its end, it also briefly outlined the future communication and dissemination plans for beyond the project's end.

There has been a significant amount of growth in the project's communication and dissemination activities in year two and three, particularly as the outputs developed and implemented in the pilot applications.

Looking back at these completed activities, we can see that a great deal has been accomplished: a successful final event was hosted at a key conference related to the project, impactful dissemination material has been developed, papers have been published, events have been attended, relevant audiences have been targeted, channels managed, KPIs have been met and a high-level plan for post-REFINE has been carved out.


The REFINE project partners possess the necessary knowledge, experience and expertise to ensure, through commitment and collaboration from all partners, they've shown that REFINE can benefit society as a whole and contribute to the mainstreaming of the refinanceability of energy efficiency project



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# ANNEX 1: COMMUNICATION AND DISSEMINATION STRATEGY GRID

REFINE Communication and Dissemination Strategy Grid						
 <p><b>Project vision:</b> REFINE will contribute to the improved supply of financing sources for energy efficiency investments which has been identified by the EU as a key pillar in reaching its 2013 energy and climate targets</p> <p><b>Overall objective:</b> Develop new schemes, instruments and solutions to allow for the mainstreaming of refinancing for energy efficiency service projects across Europe</p>						
<b>Objectives</b>	Develop awareness of the REFINE project and the impact of its new solutions on the future refinancing of energy efficiency projects in Europe	Generate interest among key stakeholders (and the general public) on the solutions being developed by REFINE	Encourage the adoption of the REFINE project outputs by target audiences in refinancing and energy efficiency	To improve the acceptance by key stakeholders in the energy efficiency and refinancing sectors of the concept of refinancing for EES projects		
<b>Key Stakeholders</b>	Energy Efficiency Service Providers	Refinancing Institutions	Guarantee Funds	Market Facilitators	Banking Associations	
<b>Key Messages</b>	REFINE will streamline and simplify future refinancing for energy efficiency projects	REFINE is adapting existing guarantee instruments to improve their use in the refinancing of EES projects across Europe	REFINE is developing generic refinancing schemes for EES projects which will improve awareness of the options for financing EES investments	REFINE will develop a Knowledge Management System of current refinancing for EES projects based on expert interviews and a country-by-country case study analysis	REFINE is seeking to standardise contract stipulations to promote improved uptake of refinancing in countries where current levels of refinancing for EES are insufficient	
<b>Communication Channels</b>	REFINE project website and social media channels Twitter and LinkedIn	European-level media outlets for general and business news, research and science communication	National-level media outlets in each partner country of the REFINE project	Presentations by REFINE partners at academic conferences and industry events	Articles by REFINE project partners in peer-reviewed academic journals	Bi-annual REFINE project Newsletter issued to key stakeholders at a European and National-level
<b>Communication and Dissemination Activities</b>	2 Stakeholder Workshops in each pilot country and 2 at a European level with financial institutions and EES providers to assist in the development of the REFINE instruments and tools and to gain greater market acceptance	2 Capacity Building training events and webinars per pilot country with key stakeholders to increase awareness and to improve the implementation of refinancing instruments for future EES investments	3 Press Releases per partner at a national level with 3 pieces of media coverage (print and digital) gained for each partner and 3 Television and Radio opportunities realised across the lifetime of the REFINE project	10,000 visits to the REFINE Project Website with regular news updates, blogs and Deliverables and 6 REFINE Newsletters issued on a bi-annual basis across the lifetime of the REFINE project	15,000 impressions and 1,500 followers across the REFINE Social Media channels Twitter and LinkedIn to develop greater awareness of the project among key stakeholders in EES and refinancing	6 Presentations by each REFINE partner at conferences and industry events and 1 academic paper published by each partner in a peer-reviewed scientific journal on the interim results of the REFINE project

## ANNEX 2: STAKEHOLDERS (EU-LEVEL)

<u>Name</u>	<u>Description</u>	<u>Website</u>
European Council for an Energy Efficient Economy (eceee)	Membership based NGO dedicated to research, analysis and cooperation on topics related to energy efficiency	<a href="https://www.eceee.org/about-eceee/">https://www.eceee.org/about-eceee/</a>
European Alliance of Companies for Energy Efficiency in Buildings (EuroACE)	Association of companies involved in the manufacturing, distribution and installation of energy efficient goods and services in buildings	<a href="https://euroace.org/">https://euroace.org/</a>
European Energy Research Alliance (EERA)	European based energy research community of 250 universities and public research centres in 30 countries	<a href="https://www.eera-set.eu/">https://www.eera-set.eu/</a>
JRC - European Energy Efficiency Platform (E3P)	E3P facilitates the practical implementation of the European Commission's Energy Efficiency Directive at national, regional and local levels, with data collection and analysis	<a href="https://e3p.jrc.ec.europa.eu/">https://e3p.jrc.ec.europa.eu/</a>
European Energy Network (ENR)	Voluntary network of European energy agencies which aims to promote sustainable energy best practices	<a href="https://enr-network.org/">https://enr-network.org/</a>

European Federation for Intelligent Energy Efficiency Services (EFIEES)	Promotes the activities of companies providing energy efficiency services in the European Union	<a href="http://www.efiees.eu/">http://www.efiees.eu/</a>
European Alliance to Save Energy (EU-ASE)	EU-ASE is a cross-sectorial, multi-stakeholder business-led alliance promoting the role of energy efficiency across the EU energy system	<a href="https://euase.net/">https://euase.net/</a>
European Association of Energy Service Companies (eu.esco)	To promote and support Energy Service Companies (ESCOs) in the European Union and to provide a networking involvement to support legislative and policy developments in the EU	<a href="https://euesco.org/">https://euesco.org/</a>
European Energy Forum	The European Energy Forum is a group of MEPs, private and public stakeholders for sharing information and opinions on the future of energy in Europe	<a href="http://www.europeaneenergyforum.eu/">http://www.europeaneenergyforum.eu/</a>
Euro Banking Association (EBA)	The mission of the EBA is to foster dialogue and experience exchange among industry practitioners	<a href="https://www.a-be-eba.eu/">https://www.a-be-eba.eu/</a>

European Banking Federation (EBF)	The EBF is the voice of the European banking sector, a collaboration of 32 national banking associations in Europe	<a href="https://www.ebf.eu/">https://www.ebf.eu/</a>
European Association	The EACB represents, promotes and defends the interests of 27 member institutes and cooperative banks	<a href="http://www.eacb.coop/en/home.html">http://www.eacb.coop/en/home.html</a>
European Association of Public Banks (EAPB)	The EAPB is the voice of the European public banking sector representing over 90 financial institutions in the European financial sector	<a href="https://www.eapb.eu/">https://www.eapb.eu/</a>
European Association of Guarantee Institutions (AECM)	The AECM represents 48 member organisations operating in 31 EU countries and non-EU countries. Its members are mutual, private sector guarantee schemes and public institutions	<a href="https://aecm.eu/">https://aecm.eu/</a>
Energy Efficiency Financial Institutions Group (EEFIG)	EEFIG comprises over 200 organisations working on energy efficiency investments throughout the European Union including financial institutions, investors, bank associations, energy efficiency practitioners	<a href="https://ec.europa.eu/eefig/index_en">https://ec.europa.eu/eefig/index_en</a>
European Energy Efficiency Fund (eeef)	The eeef is a European Union fund that aims to support the climate goals of the European Union	<a href="https://www.eeef.lu/home.html">https://www.eeef.lu/home.html</a>

European Mortgage Federation (EMF)	The voice of the European mortgage industry representing the interests of mortgage lenders at a European level	<a href="https://hypo.org/emf/">https://hypo.org/emf/</a>
Network of European Financial Institutions for Small and Medium Sized Enterprises (NEFI)	NEFI consists of 18 financial institutions which provide finance to small and medium sized businesses across Europe	<a href="http://www.nefi.eu/nefi/">http://www.nefi.eu/nefi/</a>
European Construction, Built Environment and Energy Efficient Building Technology Platform (ECTP)	Membership organisation promoting the future of the built environment and driving innovation, knowledge transfer and European competitiveness	<a href="http://www.ectp.org/">http://www.ectp.org/</a>
Building Performance Institute Europe (BPIE)	Europe's leading independent think-tank on energy performance of buildings	<a href="https://www.bpie.eu/">https://www.bpie.eu/</a>
European Bank for Reconstruction and Development (EBRD)	Refinancing institution	<a href="https://www.ebrd.com/home">https://www.ebrd.com/home</a>
Energy Efficiency Network Europe	Guarantee fund	<a href="https://www.energyefficiencynetwork.eu/">https://www.energyefficiencynetwork.eu/</a>

European Association of Guarantee Institutions	Guarantee fund	<a href="https://aecm.eu/">https://aecm.eu/</a>
European Investment Bank	Market facilitator	<a href="https://www.eib.org/en/index.htm">https://www.eib.org/en/index.htm</a>
European Central Bank	Market facilitator	<a href="https://www.ecb.europa">https://www.ecb.europa</a>
European Energy Efficiency Fund (eeef)	Market facilitator	<a href="https://www.eeef.lu/home.html">https://www.eeef.lu/home.html</a>

European Commission Directorate-General for Energy	Market facilitator	<a href="https://ec.europa.eu/energy/home_en">https://ec.europa.eu/energy/home_en</a>
European Banking Association (EBA)	Banking association	<a href="https://www.eba.eu/">https://www.eba.eu/</a>
European Banking Federation (EBF)	Banking association	<a href="https://www.ebf.eu/">https://www.ebf.eu/</a>
European Association of Cooperative Banks (EACB)	Banking association	<a href="http://www.eacb.coop/en/home.html">http://www.eacb.coop/en/home.html</a>



European Payment Institutions Federation (EPIF)	Banking association	<a href="https://paymentinstitutions.eu/">https://paymentinstitutions.eu/</a>
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\*The above is a non-exhaustive list of key stakeholders relevant to the REFINE project

## ANNEX 3: MEDIA LIST (EU-LEVEL)

Type of Communication	Examples of Channels
Broadcast	Euronews DW France 24 BBC World News CNN International CNBC Europe
Print/Digital - General	Euractiv EU Observer EU Reporter New Europe POLITICO.eu EU Business Eurotopics European-Views Vox Europ Financial Times
Print/Digital Science/Research/Finance/Energy	EurekAlert! research* EU EU CORDIS Portal Horizon Magazine ScienceBusiness.net EnergyPost.eu European Energy Innovation RenewablesNow EuroFinance.com European Business News Bankinghub.eu Businesswire.com

## ANNEX 4: LIST OF RELATED H2020 PROJECTS THAT REFINE HAS NETWORKED WITH

Name of Project	Website
FinEERGO-Dom	<a href="http://www.fineergodom.eu/">www.fineergodom.eu/</a>
SMART EPC	<a href="https://www.aunaforum.com/en/home-en/">https://www.aunaforum.com/en/home-en/</a>
SMAFIN	<a href="https://www.smafin.eu/">https://www.smafin.eu/</a>
ROUNDBALTIC	<a href="https://roundbaltic.eu/">https://roundbaltic.eu/</a>
FACILITEE	N/A
PROPEL	<a href="https://www.propelh2020.eu/">https://www.propelh2020.eu/</a>
SUPER-i	<a href="https://super-i-project.eu/">https://super-i-project.eu/</a>
GreenRoad	<a href="https://build-up.ec.europa.eu/en/resources-and-tools/links/greenroad-project">https://build-up.ec.europa.eu/en/resources-and-tools/links/greenroad-project</a>

## ANNEX 5: LIST OF EVENTS ATTENDED BY THE REFINE PROJECT

Event Name	Location	Date	Approx. Audience Size	Presentation
eceee summer study	Online	11/6/2021	50	Market growth models for energy efficiency financing
SEIF event	Online	23/9/2021	35	Guarantee instruments and refinancing schemes for the energy efficiency market first lessons from the H2020 project Refine
1st National Roundtable on financing energy efficiency in Austria	Austria	7/4/2022	100	Neue Förderung von Contracting durch Haftungen / staatliche Garantien (Winfried Braumann - Subcontractor e7)
Sustainable Energy Investment Forums - National Roundtable on Financing Energy Efficiency in Slovenia	Slovenia	24/5/2022	50	Mainstreaming of refinancing schemes
eceee summer study	France	9/6/22	50	The role of re-financing in the implementation of energy efficiency projects in the public sector
European ESCO Conference 2022	Germany	5/10/22	Unknown	Financial barriers to the growth of the ESCO industry - and how to overcome them
DECA - 3. Österreichischer Energieeffizienzkongress	Austria	5/10/2022	Unknown	Finanzierung von Investitionen in die Dekarbonisierung des Gebäudesektors - Welche Rolle können Energiedienstleister spielen?
E-Fix Final Conference	Online	2/6/2021	180	Innovative Financing for Sustainable Energy Investments: E-FIX experience in Croatia
ETU Initiative Conference - Panel on Energy Governance and	Spain	16/3/2022	110	Refinancing energy services - green funding opportunity?

Financing				
City storage & sector coupling (CSSC lab)-advanced training	Croatia	6/10/2022	14	Refinancing energy services - green funding opportunity
Energetska obnova višestambenih zgrada: prepreke, rješenja i mogućnosti	Croatia	8/2/2023	505	Modeli financiranja/refinanciranja energetske usluge izgradnje postrojenja OIE putem ESCO/PPA modela
Climate Leadership Programme: 2. razina, 2. dan Financiranje klimatskih projekata	Croatia	20/2/2023	6	Modeli financiranja/refinanciranja energetske usluge postrojenja OIE putem ESCO/PPA modela
Energetska tranzicija PGZ u EU perspektivi 2021.-2027	Croatia	24/02/2023	32	Projekti REFINE i PVMax: modeli financiranja izgradnje sunčanih elektrana
C4LA Launch Conference - Tracing the route for a common work	Albania	30/03/2023	50	EU level policies and best practice examples on climate action
LIFE Care for Climate EPC Training	Slovenia	20/4/2021	35	EPC models and proceses in Slovenia
LIFE C4C Consultations on buildings renovation concepts	Slovenia	10/6/2021	25	Financing & refinancing EPC
CA EED - Plenary Meeting	Sweden	12/10/2022	30	Large scale renovation (EPC)
LIFE Care for Climate EPC Training	Slovenia	4/4/2023		EPC models and proceses in Slovenia
EUREM - European Energy Managers Training Course	Slovenia	9/5/2023		Financing & refinancing EPC
	Slovenia	23/5/2023		
Innovaideas: Facilitando el Camino para la descarbonización de las Pymes	Spain	29/3/2022	30	Presentación REFINE

Smartlighting Event	Spain	28/2/2022	839	Avances en eficiencia Energética en iluminación conectada y oportunidades de financiación
Stakeholder Workshop: Seminario de introducción al proyecto	Spain	11/1/2022	31	Stakeholder Workshop: Seminario de introducción al proyecto
Webinar REFINE: Ventajas de la refinanciación en Eficiencia Energética	Spain	25/4/2022	Unknown	Webinar REFINE: Ventajas de la refinanciación en Eficiencia Energética
REHABILIVING 2022	Spain	7/10/2022	Unknown	financing opportunities to boost energy renovation
Integrated services and the role of banks in promoting energy efficiency renovation		27/4/2022	24	Why financing must start at the One Stop Shop
Building digital twin international congress	Spain	26/5/2022	130	BEEF - Building Energy Efficiency Facility as Renovation enabler
European ESCO Conference 2022	Germany	5/10/2022	50	A Sustainable Business Model to scale dEEp Renovations? Evolution of the EPC.
Project RoundBaltic: 3rd Regional Roundtable. Leveraging private finance for sustainable energy efficiency financing	Latvia	12/01/2023	60	LABEEF - a model for financing comprehensive building renovation
Project RoundBaltic: 3rd Regional Roundtable. Leveraging private finance for sustainable energy efficiency financing	Latvia	12/01/2023	60	LABEEF - a model for financing comprehensive building renovation
Sustainable Places Conference	France	08/09/22	50	Sale of Receivables from Energy Performance Contracts in Czechia. Best Practice Example.

BeSmart National Conference: Sustainable financing of energy efficiency and RES projects	Bulgaria	27/09/22	40	National roundtables in CZ and SK further development of ESCO market and EPC
EPC Code of Conduct Administration Meeting Q3 2022	Online	25/10/22	Unknown	Sale of Receivables from Energy Performance Contracts in Czechia. Best Practice Example
APES Council meeting(Association of energy service providers)	Czechia	26/10/22	7	Guidelines for EPCs subsidised from the State Environmental Fund
Regional Investment Roundtable: Scaling Energy Efficiency Investments in Multifamily Buildings	Bulgaria	23/11/22	20	Comprehensive Renovations in Czechia: combining energy performance contracting with subsidies
Energy Efficiency Projects Realised by ESCOs with Support from PRP	Poland	6/12/22	Unknown	Multisource financing of ESCO projects: combining energy performance contracting with subsidies
SMAFIN project 2nd National Workshop roundtable discussion	Greece	14/4/22	50	The role of re-financing in the implementation of energy efficiency projects in the public sector
Promotion of energy efficiency measures in the building sector (Building Green Events)	Greece	14/10/22	20	The role of re-financing in the implementation of energy efficiency projects in the building sector
Energy efficiency improvements in the Public Building Sector (BENEFIT Interreg Project)	Greece	7/12/22	50	The role of re-financing in the implementation of energy efficiency projects in the building sector
SMAFIN project 3rd National Workshop roundtable discussion	Greece	3/5/23	20	The role of re-financing in the implementation of energy efficiency projects in the industrial sector
REHABILIVING 2022	Spain	7/10/2022	15	Financing opportunities to boost energy refurbishment in buildings
WWEC 2022	Italy	28 June	42	Opportunities and Challenges on



		2022		EPC in the Italian market and the refinancing theme
ECOMONDO 2022	Italy	8 November 2022	55	Financing and Refinancing EPC in the Italian market
KEYENERGY 2023	Italy	9 March 2023	55	Financing and Refinancing EPC in the Sector of Sport and Culture
N/A	Bari, Italy	N/A	N/A	Financing and Refinancing EPC in the Italian market
Workshop Lab Edilizia e Sostenibilità - LAZIONINNOVA - SAPIENZA	Italy	15 March 2023	20	Financing and Refinancing EPC in the Italian market
International Conference - The Dawn of the Energy Age	Italy	23 February 2023	60	Opportunities and Challenges on EPC in the Italian market and the refinancing theme
K.EY Energy Transition Expo	Italy	23 March 2023	?	REFINE Project
Roundtable of Smart Finance for Smart Buildings	Bratislava , Slovakia	27 April 2023	?	Large Scale Projects in the Czech Republic