REPORT

INVESTOR CONFIDENCE PROJECT FOR INDUSTRY, DISTRICT ENERGY AND STREET LIGHTING: DISSEMINATION STRATEGY

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1. Introduction

This plan outlines the dissemination and engagement strategy for the Investor Confidence Project for Industry, Street Lighting and District Energy (I3CP) key target audiences throughout Europe. The framework includes a range of strategies, content types and tools that will be used to most effectively reach our audiences about the project’s relevance and ultimately its importance for significantly supporting investment decision making into energy efficiency.

In order to be effective, the strategy must account for the current state of investments into the industry, district energy and street lighting, and firmly ground itself into the up-to-date communications context. The target audience consists of all actors and stakeholders that may be interested in the project. A continuous dialogue with these actors and stakeholders throughout the development life cycle of I3CP will guarantee a well-informed and well-rounded co-creation of the project.

The success of the past ICPEU project prompted several industrial and financial players to voice demands for something similar to be introduced into the industry and infrastructure sectors, hence I3CP. A dissemination for I3CP will occur in several phases starting with early dissemination which includes announcing the project and seeking to recruit stakeholders into the project. Given the high profile of ICP and the relatively short time-scale of I3CP, it is anticipated that this will rapidly transition into Phase 2, which focuses on formally engaging early adopter project developers, Quality Assurance (QA) agents and investors around specific existing projects and programs.

This strategy describes in detail various formats, tools, and media that the project will use to spread knowledge of the project, provide project updates, educate key sectors about protocols, and recruit allies. Two overarching streams of dissemination are in place to address the following dissemination objectives – raising awareness of the benefits of standardisation, engaging relevant industry sectors, and ensuring European Union-wide adoption of I3CP. While one stream will specify efforts in early adopting countries in order to build traction among potential project developers and recruit early adopting projects that I3CP can then support towards certification, the other will cover pan-European visibility.

I3CP’s intention is to incorporate the industry and infrastructure sectors within ICP’s overall efforts of increasing investment inflow for energy efficiency by using the proven dissemination approach from ICPEU, and innovative communications by the I3CP communication lead (Energy Efficiency in Industrial Processes, EEIP). By proactively engaging with the demands and needs of stakeholders, I3CP can successfully increase confidence in energy efficiency project transactions and improve communication between financial institutions, project developers and project owners.
2. Analysis and Lessons Learnt

Forward movement for the Investor Confidence Project comes into being with the continuation of ICPEU into a new project, I3CP. Where ICPEU focused only on the building sector, I3CP will focus instead on the industry and infrastructure sectors.

2.1 Investor Confidence Project – the brand

The Investor Confidence Project for industry and infrastructure builds upon the recognition of the existing H2020 project on buildings. "ICP" is the overarching brand for the actual projects (ICPEU and I3CP). "Investor Confidence" is the key focus, while the use of the word "project" is associated with physical, impact-orientated work.

Additionally, the ICP brand builds upon helping investors, project developers and project owners (clients). The success of ICP is not intended to only benefit financial institutions, but rather to create a win-win situation for all players in the energy efficiency ecosystem. The belief system behind ICP takes these three groups and their needs into equal consideration. Intentionally, the brand name, Investor Confidence Project, and the logo including financial buildings, primary focus on investors as a target group, secondary association to project developers or project owners. In summary, ICP as a brand is the umbrella under which the campaign for ‘increased investment flow in energy efficiency’ exists.

2.2 The ICP tagline

In conjunction to what was stated above about the ICP brand needing clarity, it would be helpful to enforce the relationship between the Investor Confidence Project brand and the ICP tagline: “Unlocking capital for energy efficiency projects.”

2.3 Social media

As social media continues to grow in power and influence, we must give our target groups a clear path to their interests. A decision is made on the method of social media strategy. I3CP information are to be distributed in a way that is proportional to the number of relevant users on each platform through channels that are chosen based on relevance to the target audiences and their ways of engaging with social media. Taking target audiences into consideration and engaging them with information on their preferred platform essentially suits itself as customised, 1:1 communication. This will ensure the presence of interested users on the chosen platforms, whereas a mass approach may cause the perceived value of I3CP to be lowered due to uninterested viewers. This effect of a mass approach would skew the tracking statistics. The hashtag used is #ICPEurope.
2.4 The use of “Confidence” as the mobilising concept

The ICP brand emphasises “confidence” as the driver of its efforts. Given the above mentioned refocus of ICP communications, the revised brand provides the opportunity for additional core drivers to be added. Drivers to be considered would have to take into account the clarification of the multidirectional flow and other players that are important to investments in energy efficiency. For example, another driver of this movement could be “ease”. The ICP brand and I3CP project works to promote an easier, more trustworthy way to invest in projects as well as an easier, credibility-building way to develop or own projects. With expectation of lowering transaction cost over time through experience.

2.5 Digital Icons

The use of the current logo is to be expanded from ICPEU to I3CP project. No changes are deemed necessary.

Additionally, any dissemination results (in any form, including electronic) must: (a) display the EU emblem and (b) include the following text: “This project has received funding from the European Union’s Horizon 2020 research and innovation programme under grant agreement No 754056”.

2.6 ICP website

The existing ICP website will be updated to include industry, street lighting and district energy. The objective is to present ICP as one accreditation & certification brand for the whole of industry, infrastructure, and the built environment. Currently, the website gives broad information about the entire ICP project, but it is difficult to find any evidence that I3CP is underway. The website will be modified to include specific sections of industry, street lighting, and district energy as to allow users to go directly to their sector of interest. Specific actions include:

- add “about” in ICP Europe pull down menu
- describe origins of ICP (US/Europe Buildings)
- describe what we are doing now
- create a “news” section to be shown as the latest “brief announcement”
- revise the country pages to mention industry & infrastructure as well as buildings.
- ensure the full I3CP consortium is described.
3. Objectives

Building upon ICPEU, I3CP works to further stimulate the flow of energy efficiency investments in Europe by:

- Addressing the lack of standardisation in development and documentation of energy efficiency projects.
- Addressing the lack of building performance measurement & verification
- Inspiring the confidence to invest in energy efficiency projects.
- Building mutual trust within the energy efficiency ecosystem (financial institutions, project developers, clients), ultimately growing the market and its access to capital.

In order to achieve this, the following activities and objectives must be implemented and upheld:

- Reduce real and perceived risks held by financial institutions towards energy efficiency projects by developing and deploying an accreditation system where such projects gain the IREE certification.
- Create awareness to convince financial institutions, project developers and clients in all sectors to understand the benefits of the ICP approach.
- Ensure that project developers put enough thought and development into energy efficiency projects by requiring them to adhere to benchmarks put into place by the certification process.
- Stimulate confidence and reduce uncertainty/costs by setting forth standardization tools for the projects, which in turn will lower diligence and time costs felt by the investor to check the project.
- Easy comparison between projects and their performance data by developing a portfolio/database representing the aggregation of the projects and their performance which needs to be easily accessible by investors and clients.
- Increase the number of willing investors in energy efficiency projects by growing the existing ICP Investor Network and bridging the communication gap between investors and project/customer.

4. Regional Focus

Ever more, the dynamics between financial institutions, businesses, and the public sector become increasingly complex. The I3CP project will use the tried-and-tested existing dissemination approach of ICPEU and modify it to take into account the new industry complexities and the lessons learnt from ICPEU.

One key difference is that the industrial sector is more international compared to the more
localized building sector with both clients and vendors often operating across borders. The large number of international corporates and SMEs, together with Europe-wide industry associations means that the adoption is likely to cross borders much faster. In response, I3CP will have a European wide dissemination program, which involves a suit of beneficiaries, other consortium groups, and events. This will be backed up by the In-Country Advocates in the five countries building upon work already carried out in ICPEU by taking the project to industry and infrastructure project hosts and project developers. They will be relied upon for country-specific communication.
4.1 EU level Dissemination and Engagement

EnergyPro

- EnergyPro is an advisory company specializing in energy efficiency, energy management and the financing of energy efficiency. As internationally recognized energy industry and energy efficiency specialists, their primary dissemination role is using UK & European networks to reach out across the EU extensive global network. They will also publish articles in relevant journals and present the project at relevant conferences and seminars, building on the successful dissemination of ICPEU.

EEIP

- Energy Efficiency in Industrial Processes (EEIP) is a neutral, and open, business & policy platform for industrial energy efficiency. With a network of energy managers and practitioners in industry that is 140,000 strong, EEIP will directly access this network for dissemination and engagement efforts. Existing links via partnerships, social media, magazine, events will be used.

GRESB

- GRESB is an industry-driven organization committed to assessing the ESG performance of real assets globally, including real estate portfolios and infrastructure assets. More than 200 members, of which about 60 are pension funds and their fiduciaries, use the GRESB data in their investment management and engagement process. GRESB provides access to and communication with major financial institutions. They will publish 3-6 monthly posts about the project, explaining to infrastructure companies and funds as well as financial institutions the aim of the I3CP project and keeping them up-to-date on the progress. A reference to the blog will be added to the GRESB newsletter, sent to 3,300 contacts, and will also be publicly available to the GRESB website (GRESB Insight.) They will also inform their members on the standardization and certification of energy efficient projects and the certification through GRESB Insight with a blog upon completion of the project.
4.2 Other Consortium Groups: Steering Groups

**European Steering Group**
ICPEU’s existing European Steering Group membership is shown below. It should be noted that members are subject to change given the ongoing ‘recruitment’ and in relation to their specific interests:

**Finance**
- Green Investment Bank (UK) – Richard Braakenburg, Vice President
- ING Bank (NL) – Stephen Hibbert, Global head of Energy & Carbon efficiency
- Serimus S.A. (LU) - Frédéric Brodach, Managing Partner

**Product Developers and Corporates**
- ARUP (UK) – Thomas Briault
- EdF (FR) – Laurent Kraif, CEO, EDF/ESCO
- E.ON (DE/UK) – Charles Bradshaw-Smith, CEO, SmartKlub
- Siemens (DE/UK) – Stephen Barker, Head of Energy Efficiency & Environmental Care
- Harry Verhaar – Head of Global Public & Government Affairs Philips Lighting*,
- Steven Kokuda – Executive Director International Copper Association*

**Specialist Consultants and Industry Associations**
- RdA (PT/SP) – Jorge Rodrigues de Almeida, Managing Director
- ICPEU (UK) – Steven Fawkes, Senior Adviser
- EuroACE (BE/UE) – Adrian Joyce, Secretary General
- Eu.ESCO (BE/EU) – Dr. Peter Hug, Managing Director
- Osborne Clarke (UK) – Simon Hobday, Energy Partner
- Climate Strategy Partners (ES) – Peter Sweatman, President
- Building Performance Institute of Europe (BE/EU) – Oliver Rapf, Executive Director

**Public Agencies**
The role of the **Steering Group** is to:

1. Provide strategic guidance of the project.
2. Provide advice and contacts to the project in the nature of an advisory board.
3. Ensure wide acceptance of the project concept and results by communicating the project objectives and status to senior executives in their own organizations and others in the energy efficiency, property and finance industries.
4. Facilitate adoption of I3CP within their own organizations.

The current Steering Group members were all early supporters of I3P and therefore partially self-selected. In I3CP there will be a concerted effort to expand the Steering Group in three important dimensions:

- **Industry representation:** Firstly, to recruit members with specific interest in industry and infrastructure (to complement those existing members with those interests) - targets already identified include representatives from Schneider Electric (industry), COWI (District Energy), GE Lighting (street lighting), and Philips (street lighting).

- **Country representation:** expanding geographic representation into other EU countries. Targets already identified in Italy, Spain, Latvia & Czech Republic.

- **Financial representation:** expanding representation from the financial sector. Targets include inter alia: Triodos and BNP Paribas.
The National Steering Groups

ICPEU already has National Steering Groups in place in four priority countries - Portugal, Austria, Bulgaria and the UK. In addition, in Germany the ICA will pursue the strategy that has proven successful in ICP, i.e. 1:1 meetings and calls with key market stakeholders. The National Steering Groups:

1. Drive the dissemination efforts in each selected country
2. Interact with stakeholders
3. Engage with project developers and help to recruit early adopters
4. Represent ICP within their own organisations and networks.

Specifically, the National Steering Groups have been instrumental in successfully recruiting Allies, entities that support the work of ICP, with more than 170 Allies at the time of writing. Many of these have an interest in industry and infrastructure projects as well as building projects and I3CP has been created to address their needs. I3CP will build on that solid foundation by recruiting additional allies across all sectors relevant to the project (i.e. industry, district heating and street lighting). As with the European Steering Group, the In-Country Advocates will also recruit additional members representing industry and infrastructure.

4.3 EU Sustainable Energy Week 2017 as a Launch Opportunity

The European Sustainable Energy Week is part of Europe's program for a secure energy future. As a gathering place for public authorities, private companies, NGOs, consumers, SMEs and more, the opportunity to meet people and exchange information and ideas on energy efficiency, decarbonizing the economy, and innovation is unparalleled. I3CP used this week to join live tweeting and send messages about I3CP; in this way, we were able to reach the diverse audience attending. I3CP leaders will also contact district energy associations to secure a presence in EUSEW programme or the social media/communication connection.

As a hub of innovation and exchange of ideas for progress in one of the main topics, energy efficiency, this was a perfect launch opportunity for I3CP to make its debut and gain more Allies and supporters.
4.4 In-country Advocates – driving local engagement

I3CP will apply the concept of In-Country Advocates that had been successfully applied in the ongoing ICPEU project. Traditionally, energy and related areas depend heavily on a region's specific capabilities and customs. Because the complete and sustainable adoption of energy efficiency ideals requires more than compliance to standards, we must speak to inspire a cultural and behavioral shift. Therefore, regional expertise is essential for introducing I3CP. Having in-country-advocates lead the engagement activities in their specific countries is the best way to assure credibility, trustworthiness of knowledge, and sensitive communication between the sender and receivers of the message.

The five In-Country Advocates (Denkstatt Austria (AT), Denkstatt Bulgaria (BG), Serimus (DE), RdA (PT/SP) and Verco (UK) have been representing ICP for more than 18 months and are therefore very familiar with the overall project and well known within their respective countries. Per this success, it is envisaged that I3CP will identify and engage with potential ICAs in three additional countries.

The following table presents the in-country-advocates and a brief description of their dissemination role:

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<tr>
<th>Partner Name</th>
<th>Profile</th>
<th>Dissemination Role</th>
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<tr>
<td>Verco – United Kingdom</td>
<td>UK and International sustainability consultancy – experts in certification</td>
<td>Technical coordination of tool development across early adopting countries. Involvement in all aspects of ICPEU from inception to delivery. Country advocate for the UK.</td>
</tr>
<tr>
<td>RdA – Portugal and Spain</td>
<td>Energy efficiency consultancy – active in Portugal and Spain</td>
<td>Country advocate for Portugal and Spain. Involvement in all aspects of ICPEU from inception to delivery. Strong relationships with project developers and asset owners. Also involved in technical development of tools.</td>
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<tr>
<td>Serimus - Germany</td>
<td>Independent energy efficiency Asset manager – focus on Germany</td>
<td>Country advocate for Germany. Involvement in all aspects of ICPEU from inception to delivery. Strong ties into the financial industry.</td>
</tr>
<tr>
<td>Denkstatt GmbH –Austria and Bulgaria</td>
<td>Sustainability Consultancy – Austria, Bulgaria, and Eastern Europe</td>
<td>Country advocate for AT and BG. Involvement in all aspects of ICPEU from inception to delivery.</td>
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Each in-country advocate prepared their own in-country dissemination strategy. These are included in Appendix IV.

4.4.1 Verco – United Kingdom

Verco Advisory Services Ltd is a sustainability advisory company with a 27-year track record in energy efficiency and clean energy development. Verco has worked extensively in the areas of energy efficiency project identification, development, monitoring and financing and is currently part of a consortium delivering the Investor Confidence Project to the EU.

Their dissemination role: presenting the project at industry events (seminars and conferences) each year, such as those organised by The British Property Federation, The Scottish Property Federation, The Better Building Partnership, The UK Green Building Partnership and others.

Importantly, Verco has considerable experience in the industrial sector and good relations with such organisations as the Carbon Trust.
4.4.2 RdA - Portugal

RdA Climate Solutions is a privately-owned Portugal-based independent advisory firm working on effective climate change adaptation and mitigation strategies for local industry, multinational companies, financial institutions, communities and governments. RdA Climate Solutions dissemination tasks are to:

- Organise, in partnership with companies, industry and finance stakeholders, national and international seminars and webinars.

- Implement dissemination strategies using industry and environmental association channels (PT: APMETA, APEA, APESE, APE, APIGCEE, BCSD Portugal, APFM, COGEN; SP: ANESE, A3E).

- Present the ICP Europe project at various Industry and Energy Efficiency events in Portugal/Spain and Europe such as the Industry Energy Efficiency Seminars, Energy Agencies National Meeting, Facility Management seminar, among others.

- Publish articles, news and press releases in technical magazines such as Indústria e Ambiente (PT), O Electricista (PT), Edifícios e Energia (PT), O Instalador (PT), Climaeficiencia e Electroeficiencia (SP), proinstalaciones (SP), finance magazines such as Dinheiro Vivo (PT), industry/news websites such as GreenSavers (PT) or Smart Lighting (SP) and in national magazines and newspapers.

4.4.3 Serimus - Germany

SERIMUS sources, develops and manages investment opportunities for selected institutional investors in its areas of expertise: energy efficiency, renewable energy and various environmental markets worldwide.

SERIMUS dissemination role: Serimus has selected a range of publications and media channels (such as Forum Nachhaltige Geldanlage, Handelsblatt Nachhaltige Investments, Bizz energy, Energie & Management) and events/trade fairs (such as the dena Kongress, E-World and DENEFF Conference) where it will seek to present the results of I3CP (it has already been invited to present I3CP results during the 2017 E-World and the 2017 dena Kongress).

4.4.4 Denkstatt - Austria and Bulgaria
Denkstatt is one of the leading consulting companies in the field of environmental protection and sustainable development, offering services in the following areas: Resource Management, Sustainability Management, Environmental Management, Urban Management, and Energy & Climate. Denkstatt is one of only a few successfully certified consultants in quality and environmental management (ISO 9001:2008 and 14001:2009).

Denkstatt dissemination role: Denkstatt will present the project at conferences and other industry events, regularly communicate with interested people and the media in Austria and Bulgaria, directly engage with Austrian and Bulgarian stakeholders on a regular basis (personal meetings and communications), and engage key financial players (such as Raiffeisen, ERSTE Group, UniCredit Group) and insurance companies (such as Vienna Insurance Group, Zurich) across Austria and Bulgaria through events or other project-related dissemination activities (e.g. trainings).

5. Technological and Industry-Specific Focus

This I3CP project aims to impact the flow of investment into energy efficiency projects by creating a standardisation process and associated tools to certify projects and programs as being Investor Ready Energy Efficiency (IREE).

With ICP’s diversification through I3CP, we must take care to distinguish the different offerings I3CP has planned. The protocols, databases, annexes must be written in such a way that experts and professionals from different industries and sectors will be able to understand it. The working groups of the Technical Forum will play a major role in providing technical and expert insight for developing standardization tools and protocols.

6. Target Audience Analysis

Based on the themes and objectives, a wide spectrum of key target groups/stakeholders have been identified for their potential engagement and likelihood to be impacted by and participate in I3CP’s goals.

6.1 Target Groups

These target groups include investors and lenders, project developers, project owners, and policy makers.

The following table presents the primary target groups and rationale behind choosing them:
Investors and Lenders

This target group holds a power in being the short/long-term investors in energy efficiency projects. As a source of capital, investors and lenders have the means to grow the energy efficiency market; therefore, their investment decisions carry an important weight. With I3CP in place, financial institutions will have access to an aggregate database of previously successful projects that they can refer to when calculating potential risks. This database must achieve a critical mass of credibility and trust before it can be widely accepted as a resource for energy efficiency decisions. Investors and lenders will look for evidence of the achieved energy efficiency returns before making a decision on their current project. The database essentially gives financial institutions a proof of repeated success, which serves to both increase confidence and entice them into a new market. Additionally, I3CP's development of standardised procedures and processes will simplify the process of checking the technically detailed project proposals. With an IREE certification, investors and lenders can rest assured that the project has been developed and compared to a benchmark, thus they do not have to worry about checking the audits themselves. The certification saves financial institutions diligence and time costs, the two factors that were
the main sources of reluctance in the past for energy efficiency projects. I3CP offers immediate and long-term benefits that should be of enormous interest to investors, because they could greatly benefit from low risk and steady return energy efficiency investment.

Energy Efficiency Project Developers

These project developers are the source of energy efficiency projects. One of the barriers preventing their progress is the lack of trust from investors and lenders. This is especially a barrier for small to medium companies that cannot fund a project from their own pockets. I3CP’s standardization tools and project database will effectively increase investor confidence, and as a result will lead to a greater inflow of investment and capital. Furthermore, the database can also serve as a reference for new project developers looking for a successful template. Additionally, I3CP will set a firm benchmark for projects with the process of getting the IREE certification. Within the first two years of the project, the training to get this certification will be free. Knowledge of getting the certification will be highly valued and sought-after as it will become something that investors, and project owners demand. As more capital flows into the market, energy efficiency will build up more trust and create a positive feedback loop of credibility and market growth.

Project Owners

Project owners include private and public sector customers for energy efficiency projects. As clients, they have a unique sway over the success of energy efficiency project developers, because they hold the power to reject or accept an offer. As such, I3CP has the potential to influence a project owner’s demands to project developers. Specifically, once I3CP’s standardisation tools, databases, and certification process have achieved a certain credibility threshold, project owners can begin to demand the IREE certification. Consumers in all targeted areas have project ideas that they would like to see realised. There are many barriers that are slowing down (or stopping) the process. Such consumers need to see the overall benefits of the ICP approach. Project owners will see the proven success of previous, certified projects and will be able to appreciate the relatively standardised dialogue between client, developer, and investor. With growing demand for IREE certification, project developers will have no choice but to obtain certification. This interaction helps create high quality energy efficiency projects and progresses the concept in the minds of the public.

Verifiers

The key to the project is the assuring that there is independent, credible third-party verification. Without this, project owners will not accept the process. It is quite specialised and so it will be necessary to target appropriate companies/individuals to take on this task. There is need to find them in each country. It is unlikely there will be acceptance of verifiers from other countries (even if there is no language problem).
Policy Makers

Policy makers have the power to push for energy efficiency on an executive level. By creating a legislation that places requirements for a company's operating standards and emissions, they can help I3CP take off. Many policy makers require help to understand and make the most of the opportunities that energy efficiency can offer to boost their region's operating performance and environmental/corporate responsibility. They have the unique power to urge/push for a cultural shift in people's thoughts towards energy efficiency. They can produce the environment for energy efficiency to thrive. I3CP can offer a development of a standardized database of projects with actuarial data on project performance. This can then be used in the promotion of enhanced energy efficiency and lead to a greater likelihood of attaining policy goals.

7. I3CP and its narratives

I3CP narratives should be embedded in the beliefs and brand values of the Investor Confidence Project. Despite having a single goal of increasing investment inflow for energy efficiency projects (for industry and infrastructure), I3CP will have several narratives to ensure need-sensitive communication approaches for each target group. Though the main message will stay consistent, the frame with which it's communicated as a story will change accordingly.

For example:

Investors and lenders

☐ The narrative surrounding these financial institutions should largely play upon confidence, risk, and ease. The story should clearly detail the shifting movement in each category, where one or more will increase and the other is reduced. It is known that investors and lenders operate on a conservatism principle where they strive to attain maximum return with minimum risks and costs. Therefore, we must bear that in mind and cater to their preferences. The offering must be spoken plainly and any potential negatives must come on the table as they are discovered. Afterwards, we must reinforce all benefits by emphasizing the reduced risk, diligence and time costs, as well as the increased potential for return on quality projects.

Energy efficiency project developers

☐ These companies or developers usually possess a strong corporate responsibility and drive to seek improvements in energy efficiency. They could also be coupled with a frame of business and market exploitation, for these companies could also have the
foresight to get into the energy efficiency market when it’s quickly growing. This narrative would have to promote a greater opportunity for funding due to I3CP’s efforts and emphasize the benefits of addressing the lack of standardisation within the project development/launch process.

Project Owners

☐ In today's culture of maximising benefits and profits, the private and public sector seek to thoroughly integrate and support the global or regional economy. However, they are subject to the growing megatrend of corporate environmentalism. As environmental respect continues to rise in the public consumer sector, the private sector must respond accordingly to consumer demand. This also requires the acknowledgement that energy efficiency is a concept that stems from the idea of savings. With this in mind, we must emphasize the connection between energy efficiency, savings, and profit. By bringing together these values and goals, I3CP can help your business boost operating performance and boost your reputation for abiding to corporate responsibilities of sustainable/environmentally friendly business.

Verifiers

☐ Supporting an independent, credible third-party verification helping project owners to accept the process.

Policy makers

☐ Policy makers and professionals (trade associations, EU policy consultancies, NGOs, media and others in the EU sustainable energy and financing). Objective is to share and inform of good practice as developed by the project in order for regulation include learnings and to step up efforts with developing energy efficiency that is attractive for investments.

8. Key Messages

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<tr>
<th>Target Group</th>
<th>Key Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>Investors and Lenders</td>
<td>☐ I3CP and its tools will reduce real and perceived risks as well as transaction and time costs</td>
</tr>
</tbody>
</table>
| Energy Efficiency Project Developers | □ Having a benchmark and certification guidelines to develop quality projects to invest in  
□ Reduced risk and costs allow for easier access to capital and market growth |
|-------------------------------------|----------------------------------------------------------------------------------------------------------------------------------|
| Project Owners (Clients)            | □ Standardised processes will reduce costs and performance variability  
□ I3CP helps you be the face of progress for the energy efficiency movement |
| Verifiers                           | □ Setting EU-wide guidelines based on transparent, credible third-party verification |
| Policy Makers                       | □ I3CP gives you a greater chance of attaining policy goals  
□ I3CP makes it easier for you to be a macro-force in your region and influence the culture and attitude towards energy efficiency |

### 9. Brand Values

ICP brand values should appeal to their audience and form a resonance with each of their belief systems. There should be a clear alignment of interests and values between the ICP brand, and the people it wishes to reach.

The following table details the desired reactions and pertaining ICP brand values:
<table>
<thead>
<tr>
<th>Reaction</th>
<th>ICP Brand Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thought – Brands have a rational appeal that is logical and relates to what they can do. For example, they should perform what they are supposed to do on the basis of points of difference.</td>
<td>It makes economic, business, and operational sense to introduce standardization tools to the process of developing energy efficiency projects. ICP needs to appeal to the rationality and level-headedness of financial institutions and the logical need for credibility of project developers.</td>
</tr>
<tr>
<td>Sensation – Brands appeal to the senses. For example, design features, how the brand looks and the opportunities they provide for new experiences.</td>
<td>ICP as it currently stands does not give off much of a sensation nor is it necessarily visually appealing. The visual identity is a weak point and needs to be modernized. It should clearly convey the importance of investment flow for energy efficiency.</td>
</tr>
<tr>
<td>Feeling – Brands go further than logic to deal with emotion. The power of emotional appeal is strongest when rooted in a functional or rational aspect of the brand. These values and all they represent appeal to the innermost feelings of many consumers.</td>
<td>ICP brand should inspire feelings of confidence, and progress, combined with a feeling of ease that the difficulties in transactions are acknowledged and being addressed. Where the voices of both sides are being heard to promote a win-win situation for two major players of the energy efficiency movement.</td>
</tr>
<tr>
<td>Intuition – Consumers react instinctively to brands that they feel are for ‘people like them!’.</td>
<td>Target audiences encountering ICP and I3CP, regardless of what channel they come through, should instinctively feel that ICP is relevant to them as an operational body, hence the need to partake and support its development, because they will reap benefits in the future. It relates to their corporate responsibility.</td>
</tr>
</tbody>
</table>
10. The Visual Identity

Given the adjusted focus of ICP and I3CP, visual identity is represented by ICP logo.

11. Content

This section describes the content of I3CP to be communicated through different channels and outputs.

Ultimately, I3CP is further progressing the accreditation and certification system that was put into place for buildings by ICPEU. However, additional tools will be developed and focused on standardizing the process for developing energy efficiency projects specifically in the industry and infrastructure (district heating and street lighting) sectors.

11.1 Roadmap to Investor Confidence (5 steps for any project)

The following process can be described as a roadmap towards certified Investor Ready Energy Efficiency projects. By following these steps, one can achieve Energy Efficiency projects that are (i) standardised (i.e. follow a catalogue of best practices), (ii) optimised and verified according to ICP protocols in terms of their performance and (iii) trusted by investors who can make their investment decisions comfortably on predicted savings.
0. Origination
- Energy efficiency projects come from any range of channels, programs, and businesses

1. Project Development
- Project developers develop and document their projects according to ICP protocols

2. Quality Assurance
- Third-party accredited QA providers will review the project and assess it for ICP compliance

3. Certification
- After successful conclusion of the quality assurance review – the project is certified as Investor Ready Energy Efficiency (IREE). This certification allows investors to place trust in the project’s performance

4. Underwriting
- Asset owners (i.e. building owners or industrial asset holders) and investors can more confidently make investment decisions because of more reliable predicted savings.

5. Performance
- This process will lead to optimised energy performance and to energy savings after execution.

Superior performance of certified projects will further build the trust in the ICPEU methodology and lead to its wider adoption.

11.2 Success Stories
In order to alleviate any scepticism and boost excitement and trust, success stories from pioneer exchanges must be broadcasted and communicated. These success stories aim to provide concrete examples of companies undertaking the protocols developed under ICPEU and successfully boosting the investment inflow for their energy efficiency projects. Specifically, the following features must be present in each story: challenges they faced, the cooperative process with ICPEU team members, the support received, the results/benefits achieved, and the lessons learnt throughout the journey.

These stories will provide history and foundation, acting as a reference to more conservative companies or lenders. It will work to inspire and encourage them to act. Going via press releases, the website, and brochures, these success stories must be punchy, concise, and informative.

11.3 Protocols

The ICP protocols are essentially the assembly of industry best practices, existing standards, methodologies, and documentation that are needed to enable the standardized information. This effectively enables the underwriting and managing of energy performance risk. It must be stressed that the protocols will be written with the input of all key stakeholders and therefore will be being written "by the industry" rather than "for the industry" – thus aiding dissemination adoption.

Additionally, this collaboration ensures that the protocols align with each group's expectations, consider the needs of the various groups, and provide a sense of ownership to all parties involved.

The protocols will be “open source” and available to any project developer, programmed developers or investor that wants to use them.

11.4 Project Development Specifications

Project development specifications (PDS) will smooth out the many complex details of an energy efficiency project and provide a clear direction to the project development team. PDS ensures projects that are birthed from current best practices and available industry resources by providing a clear roadmap for project developers to correctly implement the array of requirements, tools, expectations, and quality management.

11.5 Index of National Resource (ANNEX A)

These indices are prepared individually for each sector. It must be clarified that these documents are separate to those of the protocols. These detail the specific relevant national regulations and design standards in all 28 EU countries. This guidance/resource can be used as an alternative to other European or International standards.
11.6 Product Development Templates

These are a first-of-a-kind ready to use templates that facilitate the fast of efficient creation of key components required by the ICP protocols, covering subjects such as operational performance verification, maintenance, monitoring, and measurement/verification plans.

These tools must also be emphasised as open source and freely available. They were intentionally developed with a bottom-up approach as to consider the inputs from all stakeholder groups and their needs. A distinction must be clearly made that ICP is not writing new standards, but rather *standardising* the use of current, existing, best practice standards for energy efficiency project development. With I3CP in place, ICP is providing the bridge between investors and project owners/developers.

It is important to have one European set of protocols rather than a series of national protocols, using the appropriate index of national resources, project developers will be able to use appropriate national standards while still complying with IREE.

11.7 PD & QA training materials

Certifying project developers and quality assurance providers is a crucial element of the I3CP approach, as it builds an ecosystem of developers and QA providers who can develop and certify IREE compliant projects. I3CP will develop specific training packages for PDs and QA providers – trainings will be primarily carried out via webinars.

12. Tools and Channels

Although mass media will be used extensively, as they have been in ICPEU, experience gained in ICPEU has shown that personal communications – initially through speaking at events and then through 1:1 meetings – is the most effective way of engaging market actors. ICPEU focused on buildings related events and I3CP will focus on industrial energy efficiency and management events and channels.

12.1 Website

The website is a key medium for this project and as such it must be well structured and have clear, easy access to the details for I3CP specifically. A positive user experience can be achieved via a combination of user-friendly navigation, a clear sense of customer, sensitivity to needs, positive customer touch points, and effectively presented information.

It is essential that the website supports its microsite and web portal features. The functionality of the microsites is especially important in order to support the community of
the site and to be inviting for new users. The website will act as an information and motivation hub for I3CP’s effort to increase investment flow into the energy efficiency industry.

It must be quick to load, simple to understand, easy to navigate, clean, have good use of fonts and a sensible use of colour.

Specific landing page updates:

- Add “about” in ICP Europe pull down menu – and describe origins of ICP (US/Europe buildings) and what we are doing now
- European team update
  - Add picture of the team from the staircase (as used in Twitter to be consistent)
  - Create a new “news” to be shown as latest “brief announcement”
12.2 Press Releases and Press Strategy

Press and “traditional” media such as newsletters, print ads, and press coverage remains an important tool in reaching the I3CP target audiences. These mediums can target a very specific audience with detailed information.

For I3CP, press releases will be issued and aimed at the relevant industry markets and financial sectors. Additionally, the consortium will issue regular press releases at key milestones of the project and will make use of the CORDIS Wire service for major project result announcements. This will build on ICP’s successful dissemination campaign and I3CP will be presented as an extension of ICP with all communications using the well-established ICP brand and house style.

If possible, it would be beneficial if I3CP could also release periodic updates on news channels such as NPR, TED, or other podcasts. This would effectively reach the up-and-coming young professional generation as well as listeners of all ages.

12.3 Existing Networks

ICP
- Allies, supporters and the Investor Network

EEIP
- EEIP will make full use of its network with over 140,000 professionals working in industrial energy efficiency and financing to disseminate I3CP. Existing links via partnerships, social media, magazines, and events will be used.

GRESB
- GRESB will publish 3-6 monthly posts about the project, explaining to infrastructure companies and funds as well as financial institutions the aim of the I3CP project and keeping them up-to-date on the progress. A reference to the blog will be added to the GRESB newsletter, sent to 3,300 contacts, but will also be publicly available on the GRESB website (GRESB Insight.)
- GRESB will inform its members on the standardisation and certification of energy efficient projects and the certification through GRESB Insight with a blog upon completion of the project.

Consortium
Member networks in individual countries

Industry Groups & Associations
- ESCO associations, cogeneration and district heating associations, etc. on a European and national level

The Technical Forum
- By recruiting more interested members in the industry and infrastructure sectors, we will expand the existing Technical Forum (currently over 170 members). In addition to providing input to the project it forms another important channel for dissemination as well as a means of identifying early adopters who will use ICP in their own projects.

The Working Groups
- Working Group members are also a channel for dissemination and form a natural pool of potential early adopters.

12.4 Promotional Materials

Promotional material will increase I3CP's brand presence as well as the project's visibility towards its target audiences. A wide array of promotional material will be produced to be effectively used at events and be uploaded on the ICP website. Care must be taken to place these promotional materials in the correct locations, where we want to be intentional with potential memory associations we are setting up. We will specifically create a brochure as one of these promotional materials.

Additionally, creating a label for the IREE certification would promote credibility and be easily seen and taken note of. These labels could go on the door of an industry building or have a placard created for it to be put in front of a district heating site or a street lighted area.
12.5 Social Media

The Media and social Media strategy is presented in Annex I of this document.

12.6 Digital

Regular email communications will continue with stakeholders that have opted to receive emails. These will be implemented using mass mailing software.

As an additional digital channel, we propose to use the search engine optimization (SEO) technique. This includes activities to optimize our brand being “returned” at or close to the top of all non-paid links. This allows for high visibility and linkage to relevant searches, websites, or articles that people may feel ready to click on next.

12.7 Contact database

We propose a single database of appropriate contacts and activities to be developed and maintained. This creates an organized, comprehensive collection of data on people involved, trained or prospective projects.

12.8 Events

Events have the capacity to connect ICP and I3CP to an experience, thus making it easily visible for people to think “that’s relevant to me”.

12.8.1 EASME

Contribute, upon invitation by the EASME, to common information and dissemination activities to increase synergies between, and the visibility of H2020 supported actions.

12.8.2 Conferences and Trade Shows

Attend large, international industry conferences and trade shows as well as regular online updates are part of the proven way to get the message out – prepare presentations and keynotes at selected conferences and seminars.

12.8.3 Launch Event

A launch event will be followed by a series of regular communications in the form of update emails and press releases. The launch event will be followed by a series of specific targeted
**events**: a) engineering led companies, vendors and ESCOs developing projects b) industry and infrastructure project hosts (which will be different groups – with infrastructure being more targeted at the public sector) and c) the financial sector.

There will also be specific events aimed at bringing together the project developer community and the financial community along the lines of the **Investor Days** initiated by ICPEU for the building sector. These are aimed at introducing project opportunities to investors and bridging the gap between the two groups. There will be a series of **events/webinars** starting with a launch event/webinar to explain ICP’s expansion into the industry and infrastructure sectors, setting out the program of work and recruiting members of the various forums and potential early adopters.

**12.8.4 I3CP Beneficiaries Event**

An event that invited those who work on the project and shown active support and investment could be invited to a semi-formal event to mark the start of this project. This would promote the idea of healthy exclusivity of professionals working to make this certification happen and provides an environment for engaging between the different people dedicated to the project. This would allow people to see one another and have a dialogue which is important to goals aligned for I3CP.

**12.9 Local Energy Managers**

**Situation**: Large industrial firms have energy management systems and employ Energy Managers to actively monitor and manage energy efficiency issues. Energy Managers will have the skills to put the I3CP protocols into practice and become certified Project Developers themselves. The tens of thousands of SMEs, a large portion of which are companies with several hundreds of employees and cross-border operations, do not generally have the infrastructure to develop energy efficiency projects to an investor-ready standard and would need assistance from an external project developer.

**I3CP Action**: The EEIP network and local energy managers’ associations will be good channels for I3CP. External project developers pulled in by EEIP to help industrial firms to develop projects could be either independent consulting firms already undertaking energy audits etc., vendors of energy efficiency equipment ranging from SMEs through to multi-nationals, or specialized Energy Services Companies (ESCOs).

**12.10 Action Plan and tracking**

All activities are tracked in joint action plan that is hosted on project management tool Trello.
See it here https://trello.com/b/VxuW0Ynd/i3cp-activity-board

### 13. Evaluation

<table>
<thead>
<tr>
<th>Obj. 1</th>
<th>Obj. 2</th>
<th>Obj. 3</th>
<th>KPI at M24</th>
<th>M9</th>
<th>M12</th>
<th>M15</th>
<th>M24</th>
</tr>
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<td>Recruit additional stakeholders focused on industry and infrastructure either to join the Technical Forum or become allies or both</td>
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<td>-</td>
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<td>-</td>
<td>-</td>
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<td>Recruit additional project developers and QA providers focused on industry and infrastructure to enter the accreditation process</td>
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<td>Number of training courses delivered</td>
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<td>4</td>
<td>6</td>
<td>8</td>
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<tr>
<td>X</td>
<td></td>
<td></td>
<td>Number of early adopter projects and programs that have signed MoUs to use ICP and are receiving support</td>
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<td>2</td>
<td>4</td>
<td>6</td>
</tr>
<tr>
<td>X</td>
<td></td>
<td></td>
<td>Number of financial institutions adopting ICP</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>X</td>
<td>Number of countries with projects and programs adopting ICP</td>
<td>3</td>
<td>5</td>
<td>7</td>
<td>8</td>
<td></td>
<td></td>
</tr>
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</tr>
</tbody>
</table>
Annex I: Media Strategy

Introduction

The media stakeholder engagement focuses on success stories by offering communication about business experiences, strategies for successfully overcoming challenges, and lessons learnt by those who successfully adopted I3CP procedures.

I3CP social media activity will serve as one of the pillars of I3CP outreach. Social media is more of an engagement tool than a communication tool. For the purpose of achieving the most effective social media content strategy, it is important to recognize the multiple purposes that social media can serve. For example, large companies run their social media tactics via communication departments; they guide the social media by broadcasting press releases or new product content marketing. On the other hand, SMEs often use single social media channels to serve many purposes, ranging from marketing, to customer services, or to press and information gathering.

With this in mind, the social media content strategy must build attractiveness on several principles: size of institution, sector, geographical location, etc. I3CP target audiences include investors and lenders, energy efficiency project developers, project owners, and policy makers. Among these key stakeholders is the common interest for progress in the energy efficiency industry. The focus of stakeholder engagement will revolve around shared interests such as: time and cost savings, market growth, confidence growth, risk reduction, inflow of capital.

The intention of the social media strategy is to increase and expand visibility of the I3CP project using key messages, objectives, and progress reports. The target audiences need to recognize the added value for their business by adopting I3CP procedures. They have the chance to greatly benefit their own business performance, boast their adherence to corporate responsibility, and ultimately take part in the growth of the energy efficiency market.

Additionally, companies that are energy efficiency aware tend to appeal to the younger generation. This should serve as an incentive for institutions to adopt I3CP principles because the young adults of today are today's consumers and tomorrow's business owners. The main inhibitors for social media engagement with these existing institutions via are the attitudes, lack of knowledge, and behavioural habits of the people in charge.

Social Media: Adding Value

Building upon the successes of the ICPEU project, and moving forward with the focus on “confidence”, the present I3CP social media strategy should focus on a ‘back-to-basics’ approach, offering information on opportunities, success stories and I3CP protocols and tools. Continuing to build up a large and diverse audience within the target groups and providing good quality and relevant content that is of practical use is the first step of the
present social media strategy. The other, related element is driving engagements and conversations with the I3CP project. The objective is to create a large and dynamic social media information and support cluster that will reflect the new extension of ICP into I3CP. The I3CP social media community is to be a place of open exchange of information and trust.

Our content will be practical and tailored to our various key stakeholder groups. Showcasing success stories, information about developments, funding, engagement with communities, and events are all part of social media content.

A larger and more diverse social media audience that spans across different networks provides an opportunity for audience segmentation (sectors, countries, themes, type of engagement) and dedicated social conversations beyond baseline content delivery. A segmentation of the audience will be horizontal (themes, sectors) and vertical (level of engagement).

Thematic, geographic, and sectorial separation of audiences is preferable to link the opportunities and generate higher recognition and interests amongst the recipients. By running ‘mini’ social media campaigns (up to a week at the time) possibly around updates around I3CP development, the content will be linked to provide multifaceted information and social conversations. For linking and optimizing engagement, the intention is to use social media co-occurrence analytic tools to help identify nods such as multipliers and influencers.

Social media is a key to strengthening the ICP brand and the I3CP project through recognition and brand association. Images, quotes, videos, infographics, and all visual content used on I3CP social media will be systematically branded with ICP visual identity. This also applies to all content provided by I3CP to be used on third part social media channels.
Community management: building the audience

The immediate step will be to continue developing a large audience that is balanced in interests, geographical spread and across the social networks. Proposed audience building will seek to balance community growth and engagement among several social media networks (Twitter, LinkedIn, Facebook) with consideration of opening other channels, namely visual social media like Instagram or Pinterest.

To build social media audience, the pro-active identification of potential users, multipliers, fragmentation by interests, level of social media activity, and location will be conducted with subsequent engagement. Pro-active work on communication management also drives higher engagement on the content posted on I3CP social media.

Building the audience will also be conducted through social media mini-campaigns (sectors, countries, themes) and I3CP-related events.

Community management: driving the engagement

As mentioned above, our audience segmentation will include horizontal (themes, geographical, sectors) and vertical (level of engagement) segmentation. Horizontal segmentation can be conducted through systematic use of selected hashtags that will enable referencing of posts according to interest. They can be engaged and motivated by thematic social media polls or participation and contributions to Twitter chat or national event in their vicinity.

The vertical segmentation will be conducted by proactive identification and invitation of more engaged users or users whose engagement would benefit community (influencers, multipliers). These users can form ‘leadership’ groups from Twitter list to LinkedIn groups. They can be selected from those providing success stories and or sharing their experiences in Twitter Chat. These leading social media individuals would be selected and engaged from a variety of users.

Social media: integrated approach

Social media channels will be fully integrated with all other I3CP activities. Social media tailored training will be provided to all project operatives (event presenters, organizers, partners) in order to a) maintain full engagement of social community b) provide diversity of content for social media channels (photos, live video, event coverage).

Integration of social media in all activities (especially events) is highly important for a substantiation of I3CP social media work. Offline activities, publications, I3CP developed content, third part content, all provide diversity and substance for engagement and
conversations. Enrichment and further diversification from this content will be through use of social media native tools such as Twitter Polls, Facebook Live or Periscope.

Through social media, the continued identification of further third part relevant events with a significant potential audience presence will be included in a content management. These can include European Union SME support programs (i.e. COSME, H2020, EASME, DSM), chambers of commerce events, marketing, and trade fairs.

**Tracking and reporting**

I3CP audience growth should be set, in addition to targets, reflecting a level of activity and ensuring the most dynamic development of the social media presence. These targets should be defined per social media channel. The set targets will provide a framework for measuring the effectiveness of the new strategy to move away from building an unbalanced community resulting from a dependence on Facebook advertising. Pro-active community building will then be conducted on Twitter, LinkedIn, and Google Plus.

A vertical segmentation outlined above is a key to ensuring a dynamic social community. A differentiation of roles is a prerequisite for creating an engaged and growing social community. Social media content strategy is tailored to encourage engagement and dialogue, namely through direct commentaries, sharing, or participation in social media polls.

Analytics will be set up to a) quantify the I3CP community growth and basic engagements (audience growth, likes, shares, etc.) and b) quality users and user relations to drive social conversations.

**Implementing social media content strategy**

Sourcing, selection, and presentation of the best practices are essential for implementing effective social media content strategy. To ensure engagement, a dynamic content engagement strategy is proposed based on the on the content from the I3CP social media channels as follows:

- **Primary sources (40%)** – I3CP and ICP events, case studies, success stories, trade shows, conferences
- **Secondary sources (30%)** – EU information, support programs, calls, competitions, national Chambers of Commerce, policy discussions
- **Tertiary sources (30%)** – media (magazines, articles, manufacturing news, trade information and data)

The proportional use of the above-suggested sources can be adjusted depending on the community management priorities such as recruiting allies, events, and promoting CTAs.
**Principles – diversity but easy to manage**

The underlying principle of the I3CP social media content practice will be to ensure a variety and dynamics of information, but possible to manage.

This will effectively separate the content into two categories:

- A communication baseline: to effectively manage a variety of pre-selected sources (i.e. EU programs, media, hashtags)
- Communication highlights – own activities that provide a dynamic and enhance the engagement, less predictable on resources (events, campaigns, videos)

The key to creating a successful and engaging social media content and overall strategy is ensuring diversity and range of interests and formats.

**Diverse formats and structure for information and messages should include:**

- Illustrations/info graphics (easy development with no need to approve each image by client), using pre-approved text, pre-approved set of illustrations, images, clear branding with I3CP icon
- Photographs – own from the events, people involved, from case studies
- Events (create content from event social media representative gathering relevant presentations, speakers, photos). Consider application of live videos, such as Facebook live or Periscope
- More images – in addition to select channels (Twitter, Facebook, LinkedIn and Google+) more visual social media is suggested Instagram or Pinterest

In order to ensure easy management, the I3CP social media presence needs to be standardized, best fitting each of the individual social media networks. The minimal standard is to use of #ICPEurope hashtag and icon on I3CP images.

**Content volume and approach by channel**

Social media channels (develop timetable for progressive increase of volume of posts following moderation of activity due to change of contractor):

- Facebook – posts, visuals, consider continuing advertising campaign, events use, policy of liking pages of best practice companies and tagging them in event or ‘on sit’ photos with relevant context (regional, national, sectorial). All events to be set up a Facebook events too.
- Twitter – primary information source. Full application of editorial selection after increase of volume of posts. Linked with other social media channels (Google+, Instagram, LinkedIn, Pinterest)
LinkedIn – (business, market, case studies, contributors) immediate actions:
   o Review of conversion of connections (128) ICP Europe to ICP page
   o Optimising using page to add ICP page to their LinkedIn profiles (as project)
     this a) increase visibility of page/content b) provides the baseline of
     collaboration (multi-author posts on page etc.) c) increases the sense of
     project ownership

Google+(SEO support, business, trends, YouTube) consolidate multiple accounts and
link them

[Proposal] Instagram (events, actions, Storify feed, photo library) – dual purpose 1)
(internal use) events, and ‘on site’ easy way to post visual, no text, diversity of content
2) (EU related) increased use by EU commissioners and opportunity to connect to
different audience than Twitter and Facebook

Press and ‘traditional’ media relations
Talked about above in Tools and Channels (12.2)
Annex II: Exploitation Strategy

I3CP’s exploitation plan will build upon the dissemination programme. It will have five main pillars. The first will involve identifying and engaging with early adopters amongst project owners, project developers, and financial institutions. The second will focus on training and accrediting Project Developers and QA providers in the use of IREE. The third continues the work of the second pillar by working with the trained and accredited Project Developers, and existing networks, to identify and engage with projects and programs that can adopt IREE. The fourth pillar shifts the focus to financial institutions; we will work with selected stakeholders to assist their adoption of IREE into their investment and lending programs. The final, fifth pillar revolves around identifying and engaging with early adopters in countries outside the five initial countries who may become in-country advocates.
Annex III: Summary of Letters of Support

Overview

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<thead>
<tr>
<th>Type of stakeholder</th>
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<tr>
<td>Section 2: Infrastructure2: Street lighting</td>
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</tr>
<tr>
<td>Section 3: Industry – General and energy efficiency equipment suppliers</td>
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</tr>
<tr>
<td>Section 4: Project Developers and related services</td>
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</tr>
<tr>
<td>Section 5: Government agencies and industry associations</td>
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</tr>
<tr>
<td>Section 6: Investors and Financial Services</td>
<td>3</td>
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Section 1: Infrastructure1: District Heating

The following organizations expressed support and:

- Agreed to promote the infrastructure district energy protocol and its tools among relevant stakeholders -
  - Danish District Heating Association
  - Lithuanian District Heating Association

- Are interested in becoming an accredited project developer for district heating and improving their access to capital -
  - Wiener Stadtwerke
  - Innsbrucker Kommunalbetriebe

Section 2: Infrastructure2: Street Lighting

The company Tolerancylight is interested in becoming an accredited project developer and engaging with municipalities to develop street lighting projects on the basis of ICP. The Portuguese company Philips Lighting is interested in deploying more lighting systems based on the street lighting Protocol and tools.

Section 3: Industry – General & energy efficiency equipment suppliers

The following companies have agreed to contribute to I3CP dissemination and exploitation in the following ways:

- Siemens – interested in using industry protocols and tools to standardize development of industrial projects
During the dissemination of the Section 4: Project developers and related services, the following companies have agreed to contribute to I3CP dissemination and exploitation in the following ways:

- Magnetik Value – interested in using the industry protocol and tools as an early adopter
- SmartKlub – interested in initiating more infrastructure based projects on the basis of I3CP protocols and tools
- MPW – interested in becoming an early adopted of industrial and infrastructure protocols and tools
- SENS – interested in becoming an accredited project developer
- SmartWatt – interested in developing projects in Portugal that are using the I3CP methodology
- Amber Infrastructure Ltd – supports I3CP’s bid and offering participation in the Steering Group and assistance with drafting and dissemination of infrastructure protocols and tools

Section 5: Government Agencies and Industry Associations

The following government agencies and industry associations have agreed to contribute during dissemination and engagement in the following ways:

- German association for efficient heating and cooling (AGFW) – will promote the I3CP standards and IREE to their members
- European Heat Pump Association (EHPA) – will promote the I3CP standards and IREE to their members
- Cogen Europe – will promote I3CP standards and IREE to their members
- Association for Environmental Management and Sustainability in Financial Institutions (VFU) – will promote the standards within the operations of financial institutes
- Climate and Energy Agency Baden Wuertemberg – interested in engaging energy efficiency projects that use I3CP certification
- Italian Energy Management Association (FIRE) – intend to promote the ICP industry standard among their Italian industrial members
- I-Cleantech Vlanderen – will share I3CP information amongst their members
- RNAE – will promote the industrial and industry standards at national policy level in Portugal
- EuroACE – will promote industrial protocols among its members, many of which are active in the industrial sector
DENEFF – supports extension of ICP into industry and will promote amongst membership
DENA – will assist in the promotion of the I3CP standard among German industry
Finish Energy – will assist with the dissemination of I3CP standards to members

Section 6: Investors and Financial Services

The following financial institutions have expressed support and agreed to contribute during dissemination and exploitation in the following ways:

- Carbon and Energy Fund – will apply ICP to all its building and infrastructure investments
- Joule Asset Management – interested in deploying more capital in energy efficiency and would like to see more investible projects
- Grow Advisors, Portugal – interested in deploying capital to I3CP certified energy efficiency projects
Annex IV: In-country dissemination strategies

Germany

1. Current state and potential of the industry/district energy/street lighting

Industry

The appetite for energy services is correlated with corporate sales. In 2015 one third of SMEs with a turn-over below EUR 2m had taken advantage of energy services while two thirds of SMEs with a turn-over comprised between EUR 10m and 50m had done so in the same year. Demand is strongest from the food, hospitality and energy-intensive sectors. The most frequent request from SMEs for energy services concerns an on-site advisory visit with a focus on their machinery and processes. 90% of SMEs contract energy services with a view to reduce energy costs, 80% want to identify saving opportunities and two thirds want to contribute to environmental protection.

The EU energy efficiency directive 2012 was the starting point of the German national energy efficiency action plan that included amongst many other things the obligation to conduct energy audits. The majority of German companies has complied with this obligation. However, the expected impulse for the efficiency market, sparked by the implementation of the measures recommended by the energy audits has been weak to date. This is putting the national saving targets as defined in the national energy efficiency action plan at risk.

The market is considered to be very attractive by its stakeholders: in 2016 approximately 566,000 people were employed in the German energy efficiency markets. Corporate sales reached EUR 143 billion, up 6% on the previous year. The industry consumed 2,576 PJ in 2015, slightly more than in 2014 and representing approx. 30% of total consumption.

86% of the market considers:

(1) that the „Efficiency First“ principle should be used to strategically plan the energy system and
(2) that a quality assurance and qualification effort should be made to ensure that enough energy conservation measures are implemented and that the planned savings are achieved.

75% of the industrial energy efficiency market would welcome public support programmes for digital energy management in order to enter the „industry 4.0“ era.

70% of the industrial energy efficiency market is in favour of the introduction of standardised KPIs for corporate energy consumption

However, the market is expecting problems due to a lack of qualified staff and quality assurance mechanisms. Further an increasing number of unqualified service providers and insufficient transparency and information for consumers is expected. 28% of the market consider missing financing solutions to be a major problem, much more than in the previous year (16%).
As described above the market senses the need for objective, reliable, consistent data and highly qualified providers to further grow and find financiers. The methodology and process imposed by ICP Europe provides the necessary elements, including highly qualified providers, in a format jointly accepted by all stakeholders.

Public lighting

Public lighting is a public service provided by municipalities. Every year in Germany approximately EUR 950m are spent on personnel, maintenance and energy to light streets and public spaces. 40 to 70 percent of that are spent for energy. Due to its ban by the European Commission the share of German municipalities that have more than 50% of mercury vapor lamps has fallen from 17% in 2012 to 11.8% in 2015. 20% of municipalities have more than 50% of their infrastructure using LEDs, but 60% of municipalities still use no LEDs at all or just a small share. Hence a lot still remains to be done in this area.

30 to 50 percent of the electricity consumption of German municipalities is dedicated to public lighting. 80% of that, i.e. approx. 2.2 bn kWh or EUR 300m, could be saved using energy conservation measures. This would represent an important contribution to achieving European and national climate protection goals while also significantly relieving municipal budgets.

According to a survey conducted by dena, the German federal energy agency, amongst 900 German municipalities the major hurdles to more implementations are financial, despite their high long-term profitability, the availability of support schemes and cheap debt. Further complexity lies in legal constraints such as public procurement law. According to the same survey, the saving potential (59% of respondents see more than 29% saving potential), the project profitability and the predictability of savings are the major success factors for the modernization of public lighting.

As for the industry sector ICP Europe can help to generate trust amongst all stakeholders that the saving projections are realistic and truthfully measured.

2. Target audiences, estimated of the audience for key areas (small industry, large industry, district energy, street lighting) and how to reach different target audiences.

Over the course of ICP Europe for building projects it has proven most effective to approach stakeholders (project owners, service providers and financing institutions) that are already interested in energy efficiency and that are actively engaged in associations and energy agencies ("the yes crowd") instead of reaching out to companies with no proven engagement in the matter. Serimus will pursue that same strategy for I3CP and collaborate closely with DENEFF, dena and local energy agencies such as KEA or Energieagentur.NRW, using their member and client base, their events, publications and programs to interact with the different stakeholder groups.
Serimus will strive to build similar partnerships with other institutions representing particular stakeholders such as Verband kommunaler Unternehmen e. V. (VKU), Verband für Wärmelieferung e. V. (VfW), Bundesverband Kraft-Wärme-Kopplung e. V. (B.KWK), Verband Beratender Ingenieure (VBI) and Verein für Umweltmanagement und Nachhaltigkeit in Finanzinstituten e.V. (VFU)

3. Dissemination and communication practices employed (presentations, event participation, networking, meetings, training), tools (webinars, social media, direct engagement) and anticipated engagement with EU-wide dissemination/communication activities.

Serimus believes that successful engagement leading to IREE adoption and implementation can only come from direct interaction with stakeholders. Therefore, Serimus will attend fairs and events (e.g. of the above-mentioned associations), present ICP Europe whenever possible on these occasions and follow-up with direct physical meetings and phone calls with any stakeholder interested. Efficient deployment of resources comes from targeted and tailored messages, in cases backed by specialized publications.

Serimus will support any EU-wide dissemination and communications activities with local knowledge and network.

Portugal/Spain

1. Current state and potential of the industry/district energy/street lighting

Small industry: The Portuguese legal framework obliges all companies with consumption higher than 500 TOE to perform an energy audit and implement certain energy efficiency measures. The EE market for small industries is growing (with the help of a recent legal framework for self-consumption), with new players, however the typical SME owner is not always open for alternative financing schemes (e.g., ESCOs) and tends to implement the project “in house”. Considering the fragmentation of it and the costs of reaching the final client RdA considers this market as a non-priority market.

Large Industry: The large industries (e.g., industries involved in the Emissions Trading System) in Portugal performed mandatory energy audits over the last year. They usually have some EE know-how and experience and they are open to alternative financing schemes. The EE investments tend to be substantial. Considering the scale of it RdA considers this market as a priority market.

District energy: There is no tradition of district energy in Portugal (in fact we only have one facility www.climaespaco.pt). For the moment RdA do not have yet a necessary knowledge of the Spanish market. The first action for this sector is to collect information regarding the Spanish market (e.g., research on market size, key players, etc) and afterwards define a specific strategy. District energy is a non-priority market.

Street lighting: The Street Lighting market is the only active market in the public sector. The first ESCO public tenders were opened in the last 6 months and the implementation phase is
not yet in the ground. RdA works closely with municipalities and considers this market as a priority market.

2. **Target audiences, estimated of the audience for key areas (small industry, large industry, district energy, street lighting) and how to reach different target audiences.**

**Small industry:** In Portugal, the main sub-sectors to be addressed are Textile, Food and beverages, and metallic products. This selection is based on the number of SME that have an energy audit based on the national framework; The Spanish market will be defined after a market research.

The targets will be reached using existent contacts and partnerships. A market research will be developed.

Key Stakeholders:
- Project developers (e.g., industry energy auditors, ICP PD, Utilities);
- Solutions Providers (e.g., Siemens, Schneider, ABB, Atlas Copco, Spirax Sarco);
- National/local industry associations (e.g., ADENE, AIP, AIDA);
- Sectorial Associations. (e.g, AHRESP, CITEVE)

**Large Industry:** In Portugal, the main sub-sectors to be addressed are pulp and Paper and Ceramics. This selection is based on the RdA’s existent experience and contacts; The Spanish market will be defined after a market research.

The targets will be reached using existent contacts and partnerships. A market research will be developed.

Key Stakeholders:
- Project developers (e.g., ESCOs, industry energy auditors, ICP PD, Utilities);
- Solutions providers (e.g., Siemens, Schneider, ABB, Atlas Copco, Spirax Sarco);
- Sectorial Associations (e.g, CELPA, ANIPC, APICER, COGEN)
- Specific companies (e.g., companies under ETS)

**District energy:** The Portuguese market is inexistent. The Spanish market will be defined after a market research.

Key Stakeholders:
- TBD

**Street lighting:** This market will be addressed using RdA’s existent contacts and links in the lighting industry, municipalities and energy agencies. A market research regarding Spain will be developed using existent contacts.

Key Stakeholders:
- Project developers (e.g. ESCOs, energy auditors, ICP PD, Utilities);
- Energy Agencies (e.g., ADENE, RNAE, EnerAgen);
- LED Providers (Philips, Schréder, Arquiled);
- Municipalities and associations of municipalities (Porto, Lisbon, Tâmega e Sousa, AMP).
On top of all the EE financial market will be specifically addressed. 
Key Stakeholders:
- Private Investors (SUMA Capital, Goparity, Grow);
- Banks (BPI [PF4EE], Caixa Geral de Depósitos, La Caixa, Santander);
- Structural funds managers (POSEUR, etc);
- National public funds managers (Fundo Ambiental, Fundo de Eficiência Energética)

3. Dissemination and communication practices employed (presentations, event participation, networking, meetings, training), tools (webinars, social media, direct engagement) and anticipated engagement with EU-wide dissemination/communication activities.

The communication practices to be use for dissemination include:
- Networking
  - Using existent networks (EU and National Level);
  - Partnership with associations and EU projects (EU and National Level);
- Direct contact
  - Email contact;
  - Phone/Online (skype, ...) contact;
  - Face-to-face meetings (most effective technique);
- Training and technical assistance
  - PD/QA;
  - Technical assistance to pilots;
  - Certification of projects

The communication tools to be use for dissemination include:
- Social media:
  - LinkedIn;
  - Twitter;
- Events:
  - Presentation in public events (national [PT/SP] and EU Level);
  - Webinars
- Magazines:
  - Opinion articles;
  - Press releases;
RdA will use the main resources in Portugal. The Spanish market will be addressed through targeted actions.

Considering that RdA include on their stuff the Project Director and the Project Technical Director, RdA will support and be involved in EU-wide dissemination and communications activities.

UK

1. Current state and potential of the industry/district energy/street lighting

Industry

Improving energy efficiency in the industrial sector and industrial decarbonisation are priorities for the UK Government:

- In 2015, the UK government developed industrial decarbonisation and EE roadmaps to 2050 for 8 different industrial sectors; the study concluded that there is substantial scope for collaboration between industry, government and others to take steps in the short term that could enable industry sectors to make greater emissions reductions over the longer term whilst remaining competitive.

- The Green Paper, ‘Building our Industrial Strategy’ released in January 2017, announced the Government’s intention to develop a ‘modern industrial strategy’; this will include a review of the opportunities to reduce the cost of achieving our decarbonisation goals in the power and industrial sectors; of key relevance is that the review will cover how best to support greater energy efficiency.

- The Government’s objectives in relation to this are to minimize costs for businesses and to secure the economic benefits of the transition to a low carbon and resource efficient economy by making sure next generation technologies are created and harnessed in the UK.

- Up to £9.2m government investment has been allocated over the next four years for the Industrial Energy Efficiency Accelerator programme, to help support the commercial development of technologies within this sector, by leveraging private
sector investment and strengthening UK supply chains to reduce energy costs for UK industry.

- The development of an industrial energy efficiency scheme was included in the Conservative manifesto and subsequent Queen's Speech but no detail has been provided on what form this might take.

Key policies which relate to the industrial sector in the UK are:

- Climate Change Agreements
- Climate Change Levy
- Enhanced Capital Allowances
- EU Emission Trading Scheme

**District Energy**

- Heat accounts for a third of UK greenhouse gas emissions, so the UK needs policies that will drive a step change in emissions reduction
- Only about 2% of the UK's heat is supplied via heat networks
- The UK Government estimates that district heating has the potential to meet 20% of domestic heating and hot water needs by 2030; this level of market penetration requires significant investment
- Government is providing investment through the Heat Networks Investment Project:
  - £320m worth of support for up to 200 projects by 2021 through grants and loans
  - Leverage up to £2bn of wider investment
  - Pilot phase underway consisting of 9 projects, worth £24m of awards
- Support is also provided to local authorities in England and Wales through the Government's (Department for Business, Energy and Industrial Strategy) Heat Network Delivery Unit which was established in 2013 to provide grant funding and support from commercial and technical specialists; so far, it has provided £14m of grant funding.
• The Association of Decentralised Energy and the Chartered Institution of Building Services Engineers have developed a Code of Practice for Heat Networks which sets minimum quality standards for heat network-related products, covering all stages of project delivery, from pre-feasibility studies to design constructions, operation and maintenance; its aim is to provide increased certainty for both consumers and investors, and to embed design and performance standards for district heating projects.

Streetlighting

• The UK’s first LED streetlights was installed in 2009 in London.

• £300m annual UK spend on energy for streetlighting which is rising in line with escalating energy prices.

• 7.4m streetlights in the UK but only 10% are currently low energy LEDs (2014 data)\(^1\).

• An annual energy cost saving of £200m for the UK is estimated to be available\(^2\) by switching to LED streetlighting; the investment could be paid off in 10 years.

• Progress since then has been slow (mainly PFI projects combined with highways maintenance)

• Investors include Local Authorities, Green Investment Bank, Salix.

2. Target audiences, estimated of the audience for key areas (small industry, large industry, district energy, street lighting) and how to reach different target audiences.

We plan to approach selected stakeholders via our existing networks. We will invite some of these organisations to join our UK steering group, if they are not already members. As part of our national outreach, we propose UK webinars for each of the three sectors to all stakeholders as the project progresses.

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Industry
Key stakeholders include:
• Government bodies: Department for Business, Energy and Industrial Strategy
• Industry bodies/organisations: Major Energy Users’ Council, Carbon Trust, Energy Managers Association, Energy Institute, Energy Services and Technology Association
• Energy performance contractors: EDF, Engie, E.on, CES Energy, Dong Energy, Veolia
• Financiers: Green Investment Bank/Macquarie, Sustainable Development Capital, Amber Infrastructure, Oxford Capital
• Technology suppliers: Danfoss, Siemens, Saint-Gobain, Schneider Electric, Johnson Controls, GEA Engineering
• Manufacturers: Arla Foods, Tata, Unilever, JCB, Laguar Land Rover, BMW, Diageo

District Energy
Key stakeholders include:
• Government bodies: Department for Business, Energy and Industrial Strategy, Department for Communities and Local Government
• Industry bodies/organisations: Association for Decentralised Energy, UK District Energy Association, Energy Services and Technology Association
• Energy performance contract frameworks: Carbon and Energy Fund, RE:FIT, Essentia
• Energy performance contractors: EDF, Engie, E.on, Veolia, Vital Energi
• Financiers: Amber Green/London Energy Efficiency Fund, Green Investment Bank/Macquarie
• Technology suppliers: Rehau, GE Jenbacher, Siemens
• Consultants: AECOM, Arup, Buro Happold Engineering

Streetlighting
Key stakeholders include:
• Government bodies: Local Government Association
• Industry bodies/organisations: Institution of Lighting Professionals

• Energy performance contractors: Bouygues

• Financiers: Salix, Green Investment Bank

• Technology suppliers: Current (powered by GE), Telensa, Harvard Technology, Philips, Osram

3. **Dissemination and communication practices employed** (presentations, event participation, networking, meetings, training), tools (webinars, social media, direct engagement) and anticipated engagement with EU-wide dissemination/communication activities

• Using our existing ICP network of contacts for buildings to identify relevant stakeholders in the industrial, district energy and streetlighting sectors

• Invite new stakeholders to join the ICP ally network and technical forum who are relevant to each sector

• Invite new stakeholders to join the UK steering group who are relevant to this sector

• Influence key UK enablers to adopt and endorse ICP e.g. BEIS endorses ICP for industry in national energy efficiency documents

• Get major financial funder to incorporate ICP into standard protocols for financing energy efficiency e.g. Green Investment Bank (GIB), RBS etc.

• Build on and partner with existing campaigns supporting energy efficiency in the UK

• Ensure that activities are in line with any political and policy changes that the Government introduce

Austria

1. **Current state and potential of the industry/district energy/street lighting**
**Small and large industry:** Final energy consumption of the industrial sector in Austria has been slowly increasing in 2005-2014, which resulted in an improvement in energy intensity given the higher production growth in the same period. With regards to energy-intensive industries, the largest improvements in energy intensity were seen in the areas of chemicals and metal processing while the paper industry was constant and the cement industry and other industries showed a negative development. The Austrian Climate and Energy Fund’s “F&E-Fahrplan Energieeffizienz in der energieintensiven Industrie” (R&D Roadmap Energy Efficiency in Energy-intensive Industries) which was release at the end of 2014 after a comprehensive stakeholder process defines future opportunities for energy efficient technologies and process improvements.

Energy efficiency in industry is also driven by market demands and regulation (Austrian Energy Efficiency Law; requirements for energy audits / management systems) and supported by public subsidies (grants for the optimization of machinery and production sites as well as the manufacturing of energy-efficient products (process optimization)) and programs such as the klimaaktiv energy efficient businesses initiative.

I3CP can support small and large industry in developing better energy efficiency projects, in making better investment decisions and in attracting additional sources of external financing apart from bank loans and public subsidies. It can also support the development of public programs and subsidy schemes.

**District energy:** Austria has witnessed strong growth in district heating, with a 26% increase in the pipeline network in 2009-2013, although the growth in the pipeline network is expected to slow down in coming years. District heating accounts for 21% of the total heat demand in Austria and almost half of district heating comes from renewable sources. Currently, 2,400 district heating networks exist in Austria and every fourth apartment is heated through district heating, in particular in urban areas. This positive development is also fostered through public subsidy schemes on a national and state level and should continue according to the Austrian Energy Strategy for 2020 which puts an emphasis on district heating and renewables in the area heating in buildings as well as the recently released R&D Roadmap for district heating in Austria.

I3CP can support the sector’s development in particular by cooperating with state utilities as well as city administrations and energy departments in the larger Austrian cities. It can
support them in adapting their business models which was identified as a major research area in the aforementioned R&D Roadmap.

**Street lighting:** Street lighting amounts for up to 45% of electricity costs of Austrian municipalities and there is a pressure to upgrade street lighting due to the phasing out of street lighting lamps as well as tight municipal budgets. Therefore, LED is used more and more for upgrading public street lighting in Austrian municipalities of all sizes, driven both by the projected energy savings of more than 50% as well as by EU and national regulation. In a 2016 study among 255 Austrian municipalities, 49% of municipalities already implemented street and park lighting projects and 47% indicated that there is need for such measures. Only 4% of municipalities said that there was no need for such measures. In particular, the City of Vienna declared in 2016 that it will upgrade its ca. 55,000 hanging street lights to LED between 2017 and 2020 to save energy equivalent to the annual energy consumption of ca. 2,000 Viennese households. Also, the City of Innsbruck and its utility Innsbrucker Kommunalbetriebe (IKB) will upgrade all of the ca. 10,300 lights in the city to LED until 2020, which is the biggest LED upgrade in the Western part of Austria and will save a further 25% of energy (after initial upgrades resulted in 19% of energy savings). To date, around half of this upgrade is realised.

There are both public subsidies (state subsidies and national subsidies as well as local contracting schemes) and public guides (klimaaktiv, e5) for municipalities that want to upgrade their street lighting. The aforementioned Viennese upgrade is financed by the state utility Wien Energy as a contractor. There are several other municipalities that – also in the light of tight public budgets – also use contracting or citizen participation schemes to finance lighting upgrades.

Given municipalities’ interest in street lighting upgrades and need for innovative financing models, the I3CP project can directly address a market need in this sector. Moreover, it can cooperate with existing subsidy and support schemes to elaborate whether I3CP can be incorporate into those schemes.
2. **Target audiences, estimated of the audience for key areas (small industry, large industry, district energy, street lighting) and how to reach different target audiences.**

General target audiences (for all areas)

- Austrian Climate and Energy Fund
- Environmental Grant Authority KPC and Austrian Research Promotion Agency FFG
- Ministries for the Environment (BMFLUW), Infrastructure & Technology (BVMIT) and the Economy (BMWFU)
- Austrian Chamber of Commerce and its respective stakeholder groups
- Austrian Climate and Energy Model Regions
- Provincial energy efficiency bodies
- Banks and other investors
- Technical University Vienna and/or other Technical Universities in Austria as well as AIT (Austrian Institute of Technology)

Small and large industry

- Existing Denkstatt clients, in particular from energy audits / management systems as well as energy efficiency projects in environmental subsidy consulting
- Project developers already engaged in ICP in Austria (e.g. Siemens, Engie) but also new project developers (Denkstatt joint venture Denkstatt & enertec, ATP, etc.) and energy efficiency services providers (e.g. energy auditors)
- Austrian energy efficiency equipment vendors
- Klimaaktiv energy efficient businesses initiative
- Austrian Chamber of Commerce and Federation of Austrian Industries
- DECA (Association of energy efficiency services providers), Austrian Energy Agency and TÜV Austria
- 11 pilot regions and their respective project partners from the Austrian Climate and Energy Fund's “Vorzeigeregion Energie” (Flagship Region Energy) funding program, in particular the “OÖ4Industry” project with the manufacturing industry in the province of Upper Austria
• Stakeholders from recently released “F&E-Fahrplan Energieeffizienz in der energieintensiven Industrie” (R&D Roadmap Energy Efficiency in Energy-intensive Industries)

District energy
• Utilities Wiener Stadtwerke (Vienna) and IKB (Innsbruck) as Denkstatt clients that also supported the project with LOIs as well as other utilities
• City of Vienna Department MA20 – Energy
• City administrations and energy departments of major Austrian municipalities
• Project developers and equipment vendors
• Ministry of Infrastructure & Technology as the partner in the IEA’s District Heating and Cooling Technology Program
• Stakeholders from recently released “F&E-Fahrplan Fernwärme und Fernkälte” (R&D Roadmap District Heating and Cooling)

Street lighting
• Österreichischer Gemeindebund (Association of Austrian Municipalities)
• Österreichischer Städtebund (Association of Austrian Cities)
• City of Vienna Department MA33 – Lighting
• Wien Energie as the state utility responsible for LED lighting upgrades in Vienna
• Innsbrucker Kommunalbetriebe as the utility responsible for LED lighting upgrades in Innsbruck (and also planning and implementing LED lighting upgrades in smaller municipalities in the province of Tyrol)
• Contacts to other municipalities
• Project developers, ESCOs and equipment vendors
• ÖÖ Energiesparverband (Upper Austrian Energy Saving Association) as the Austrian project partner in the EU-funded Streetlight-EPC project

Channels/methods to reach different target audiences
• National Steering Committee members
• Existing denkstatt clients and strategic partners
• Existing ICP stakeholders
• Direct communication (e-mail, phone, face-to-face) with new stakeholders
• Industry organizations
• Partnerships with local associations and projects (EU and Austrian level)
• Public authorities
• Presence at networking (events, etc.)
• PR (in particular sector-specific media)

3. **Dissemination and communication practices employed** (presentations, event participation, networking, meetings, training), tools (webinars, social media, direct engagement) and anticipated engagement with EU-wide dissemination/communication activities

• Presentations, participation and networking at industry events (conferences, panel discussions / talks, B2B-meetings, etc.) – in particular the following conferences were identified as possible targets:
  o **Industry**: World Sustainable Energy Days, European Energy Efficiency Conference, Smart Energy Systems Week Austria, Österreichs Energie Kongress, Österreichs Energie Trendforum, Energieeffizienzkonferenz
  o **Streetlighting and district energy**: Städtetag, Gemeindetag, Fernwärmetage, Praxis- und Wissensforum Fernwärme & Fernkälte, Mitteleuropäische Biomassekonferenz, Wiener Netzservice Forum, Smart Cities Days
• (Co-)Organized own events or webinars
• Communication with and presentation at relevant industry associations
• Regular mailings (translated press releases and other relevant project news) to national media list (also use of Austrian press release platform APA OTS), industry associations and other relevant organizations
• Communication through denkstatt website and personal social media accounts of responsible denkstatt employees (e.g. Twitter @lindinger)
• Direct engagement with stakeholders, in particular through National Steering Committee meetings, regular (ca. bi-monthly) stakeholder mailings, and specific one-to-one meetings
• Specific activities with project developers, quality assurance providers and other stakeholders that have relevant technical expertise (trainings, technical assistance)
• Approaching existing denkstatt clients in the industry, street lighting and district energy sectors
• Regular exchange with other, thematically related H2020 projects in Austria (e.g. SEFIPA)

Participation in EU-wide dissemination efforts, e.g. through participation in EC-events near Austria

Bulgaria

1. Current state and potential of the industry/district energy/street lighting

Industry:
The final energy consumption of the industrial sector in Bulgaria decreased drastically in the last decades, which is mostly due to the closure of several of the large industrial plants built in the middle of the last century, including plants from the iron and steel, chemical and cement industries. In the last 5 years the final energy consumption of the industry is increasing slowly and currently industrial plants are responsible for about 29% of the final energy consumption in the country – 2701 ktoe in 2015 with an expected consumption of 2585 ktoe in 2020. According to the national legislation, almost 300 industrial installations are required to perform energy efficiency audits and to implement the prescribed measures, with some of them having individual targets set. The national target for energy savings for all industrial installations is set to 819 GWh annually until 2016. The industrial installations are from different industrial sectors, most notably from food production (63), metal products (60) and services (38). For the period 2008-2015 industrial installations have implemented ECMs totaling to 530 GWh, which seems to be lagging behind the national target with only 63% of which are achieved. According to the reports, the implemented energy efficiency measures are financed primarily by own financing (90% of the measures), which could be one of the reasons for underachievement of the national target.

District energy: In Bulgaria, there are more than 13 licensed main activity heat plants for production and distribution of heat energy through distributed systems and 11 other industrial companies delivering heat energy. The main activity heat plants service more than 600,000 customers in the country, the majority of which are private customers. The largest
companies are Toplofikacia Sofia, servicing more than 70% of the customers in Bulgaria, EVN Bulgaria Toplofikacia (5%), Toplofikacia Pleven (5%), Toplofikacia Burgas (4%) and Toplofikacia Pernik (3%). All heat plants are privately owned, with the exception of Toplofikacia Sofia, which is municipally owned. In 2015 more than 5 TWh of heat energy were produced by main activity heat plants, with more than 70% of them delivered to households. Most of the plants are combined heat and power plants, the majority of which are using natural gas as a heat source. The district heating sector in Bulgaria has been struggling to survive in the last decades – several plants have been closed down in the last decade, while others are operating at a loss with increasing debts. There are many reasons for this, including the current political and institutional framework with regulated prices, old plant technology from the middle of the last century and lack of investments, especially in the distribution networks which leads to very high inefficiency and increasing distribution losses, decreasing number of clients, significant share of which are not able pay for the service. With few exceptions, EU funding has not been provided to this sector and investments have been restricted by the regulatory authority in order to keep the end consumer process low. However, according to the National program for stabilization and development of the district heating sector in Bulgaria, at least 90 mln. EUR annually are required in order to keep the sector operational, while the current investment levels being significantly below this minimum.

**Street lighting:** According to the latest report of the Bulgarian Sustainable Energy Development Agency on the implementation of the municipal energy efficiency programs in 2016, the municipalities in Bulgaria are investing in a broad range of energy efficiency measures. In 2016, around 78 mln. EUR were invested in energy conservation measures, of which 4 mln. were invested in 35 street lighting projects. The declared energy savings from street lighting projects were around 3.7 GWh/year, with 3 thousand tons of CO2 emission savings. The implemented measures varied significantly in terms of financial efficiency, with payback periods ranging from 2 to 20 years. The municipalities are using a wide range of financing sources for the implementation of ECMs, including EU Operational Programmes, the Financial Mechanism of European Economic Area, the European Investment Bank, Kozloduy International Decommissioning Support Funds, the national budget and the municipal budgets, the National Trust Ecofund, the Bulgarian Energy Efficiency and Renewable Sources Fund, ESCO contracts and others. While currently the EU Operational
programmes are providing the largest share of financing, it is expected, that in the following years, the main source of financing should shift to other types of financing, with a significant increase of private financing.

In 2016, as a result of the performed energy efficiency audits of street lighting systems, 4 additional projects were proposed, requiring around 5 mln. EUR of investments. Large number of municipalities are yet to fulfil their obligations regarding energy efficiency audits of street lighting systems, which should result in a significant number of projects requiring financing.

2. Target audiences, estimated of the audience for key areas (small industry, large industry, district energy, street lighting) and how to reach different target audiences.

General target audiences (for all areas)

- Ministry of Regional Development and Public Works (MRRB)
- Ministry of Energy
- Sustainable Energy Development Agency (AUER)
- National Trust Ecofund
- Bulgarian Energy Efficiency Fund
- EBRD
- Sofia Energy Agency
- Bulgarian Green Building Council
- Alliance of Energy Efficiency
- Center for Energy Studies Technical University Sofia
- Center for Energy Efficiency Eneffect
- Energy Management Institute
- Financial consultants – Econoler, Matting Management
- Commercial banks and ESCOs
- Key media partners

Industry

- Existing Denkstatt clients, particularly from the mining, pulp and paper, mining and telecom industries
- Bulgarian Industrial Association
- Bulgarian Chamber of Commerce and Industry
- Energy Efficiency Auditors and Bulgarian Chamber of Energy Efficiency Auditors
- Equipment vendors - Schneider Electric, ABB, Siemens
- Utilities – EVN, CEZ, EnergoPro

District energy
- Bulgarian District Heating Association
- Toplofikacia Sofia and Sofia Municipality
- EVN Bulgaria Toplofikacia
- Toplofikacia Pleven
- Toplofikacia Burgas
- Toplofikacia Pernik
- Toplofikacia Razgrad
- Toplofikacia Ruse
- Dalkia Varna
- Toplofikacia Vratsa
- Toplofikacia Veliko Tarnovo
- Toplofikacia Gabrovo
- Toplofikacia Sliven

**Street lighting**

- National Trust Ecofund
- National Association of Municipalities in Bulgaria
- Association of municipal environmental experts
- EcoEnergy Municipal Network
- Sofia, Gabrovo, Plovdiv, Burgas and Varna Municipalities

**Channels/methods to reach different target audiences**

- National Steering Committee members will be engaged through regular meetings and newsletters in order to become ambassadors for the ICP project
- Dedicated meetings with existing denkstatt clients and strategic partners will be held in order to identify potential pilots
- Existing ICP stakeholders will be informed through regular e-mail communication
- New stakeholders with expressed interest in the ICP project will be approached through direct communication (face-to-face meetings, e-mail, phone), publications in specialized media and social networks (Facebook, LinkedIn)
- Face to face meetings and presentations will be organized for industry and branch organizations
- Public authorities will be approached through direct communication
- Networking at specialized public events would be used in order to extend the ICP network
- Media relations will be strengthened through strategic media partnerships (particularly for sector-specific media) and regular press releases

3. **Dissemination and communication practices employed (presentations, event participation, networking, meetings, training), tools (webinars, social media, direct engagement) and anticipated engagement with EU-wide dissemination/communication activities**

**Media Relations**
• Extend the existing media list with new media with focus on specialized media
• Identify key media and journalists
• Attract a strategic media partner
• Disseminate regular press releases with project news & implementation updates

Stakeholders Relations

• Personal meetings and other direct communication
• Provide regular project updates through email newsletters
• Communicate through denkstatt Bulgaria website, blog and Facebook social media account
• Create LinkedIn group for ICP experts and investors
• Own or co-organized events and webinars
• Presentations and networking at industry conferences
• Communication through industry and branch associations
• Support the implementation of online ICP trainings for project developers and quality assurance providers.
Annex V: Finance dissemination activities

GRESB ICP Communications for ICP for industry, district energy and street lighting

Objective

Effectively engage with the European investment market about the relevance of ICP and ultimately its importance for materializing energy efficiency ideals

Targets

- GRESB Investor Members
- GRESB Infrastructure Prospects, Participants and Members
- Financial Institutions

Key Messaging Channels

- Media Contacts
- Articles on GRESB Insight
- GRESB Newsletter
- GRESB Social Media Channels
- GRESB Spring Event Presentations
- Ongoing direct engagement with Investors
- Ongoing direct engagement with Infrastructure Funds and Companies

Key Messages

- Project launch announcements and awareness raising (July – December 2017)
- Invitations to ICP technical forums, events, training programmes, webinars (Ongoing throughout as forums/events established)
- Recruitment of Investors into Project (Jan 2018 onwards)
- Recruitment of Infrastructure Companies and Funds into Project (Jan 2018 onwards)
- Explanation of Protocols available to Investor Participants (April 2018 onwards)
- Explanation of Protocols available to Infrastructure Companies and Funds Participants (April 2018 onwards)
- Engagement with recruited Investors, funds and companies (June 2018 onwards)
- Dissemination of information about adopted projects (June 2018 onwards)