

D7.1 Communication strategy and results of the first activities

WP7, T7.1

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¹ PU = Public

CO = Confidential

Table of content

1.	Introduction	8
1.1	Objectives of the deliverable D7.1	8
1.2	Deliverable description	8
1.3	Contribution of partners	9
1.4	Relation with other activities in the project.....	9
2.	Objectives of the Communication Strategy	10
2.1	Alignment and contribution to project objectives	11
2.2	Communication objectives.....	11
3.	Target groups: identification, strategic objectives, and communication tools	12
4.	Communication strategy and results of the first activities.....	14
4.1	Communication strategies for project activities	14
4.2	Results of the first communication activities	15
5.	Internal communication	18
6.	Evaluation and monitoring of communication strategy	19
6.1	Evaluation and monitoring of communication activities	20
6.2	Evaluation and monitoring of communication tools.....	20
6.3	Evaluation and monitoring of the project activities.....	21
7.	Conclusions	22

Tables

Table 3.1: Target groups & key stakeholders, strategic objectives, and communication tools	13
Table.4.1 Project communication strategy	15
Table 4.2: Communication Actions	16
Table.4.3 Project branding guidelines	16
Table.4.4 Public deliverables templates	17
Table.4.5 Communication and dissemination strategy and results deliverables	17

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Disclaimer

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Abbreviations and acronyms

Acronym	Description
CTA	Call To Action
CTF	Communication Task Force
DHW	Domestic Hot Water
D&C	Dissemination and Communication
EE	Energy Efficiency
ESCOs	Energy Service Companies
KPIs	Key Performance Indicators
R&D	Research and Development
RES	Renewable Energy Source
RTD	Research and Technology for Development
WP	Work Package

Abstract of the HAPPENING project

Currently, **buildings are responsible for 40% of the energy demand and 36% of the CO₂ emissions in Europe**. Decarbonisation of existing buildings plays a key role in order to reach the overall climate protection targets. However, current renovation rates lie in the order of 1%.

Heat pumps are a key technology in bringing renewable shares into heat supply of buildings; especially their combination with onsite renewable electricity production e.g. by PV allows to bring high renewable shares. Their current installation in existing multi-apartment buildings is however still marginal.

The proposed technological solution is based on decentralized heat pumps, in such a way that it results an easy-to-install solution for installers, low-intrusive for the occupants and easily adaptable to a large number of different building situations. This is flanked by developing near-zero planning, implementation and operation processes, in order to facilitate the work during the planning phase, ensure a high-quality installation and effective operation, and reduce the efforts and costs within the whole retrofitting project. The challenge of cost-competitiveness is addressed by developing new financial and business models. Bringing new players (such as financial experts) and financing models to the renovation market is expected to bring the needed paradigm change and boost investments in the residential retrofitting sector. Dissemination of measured performance and system characteristics from HAPPENING will be one of the key results of the project.

Through **3 demo sites (Spain, Italy and Austria)**, the project will demonstrate a highly versatile, scalable and replicable solution package for buildings energy system retrofitting allowing 70-75% of renewable energy fraction, 30-50% of PE and GHG savings, reduction of planning time by 50% and installation/operation time by 30% and payback time for ESCOs and investors of less than 8 years, compared to best available solution existing today.

1. Introduction

1.1 Objectives of the deliverable D7.1

HAPPENING project aims at developing an innovative technological solution based on decentralized heat pumps in such a way that it results in an easy-to-install solution for installers, low-intrusive for the occupants and easily adaptable to many different building situations.

A comprehensive communication plan will be crucial to successfully create a positive and widely perceived presence at local, national, and European level thus, the objective of this Plan is to **outline the strategy for communication and actions carried out during the project**.

Whereas the communication strategy demands **a dissemination strategy to be implemented**, this Plan won't mention any action, channel or tool related to dissemination actions because these issues **will be detailed addressed in D7.2**, as a key WP7 deliverable.

The results and impact of this Plan will be carefully monitored. This Plan will be formally updated within D7.3 with the lessons learnt and changes in user needs considered to date.

The current communication plan is based on the description already contained in the Grant Agreement and has been adapted and extended as follows.

1.2 Deliverable description

This deliverable D7.1 provides a robust and clear communication strategy aiming at reaching out to targeted audience groups structured in 6 sections addressing the different aspects that a communication plan may focus on: overcome actions during the first months of the project, objectives, targeted audiences, detailed strategies, and ways to exploit the results from external and internal communication perspective.

The deliverable D7.1 is structured in these chapters:

- Objectives of the Communication Strategy
- Target groups: identification, strategic objectives, and communication tools

- Communication strategy and results of the first communication activities
- Internal communication
- Evaluation and monitoring of communication strategy
- Conclusions

1.3 Contribution of partners

WP7 is led by GBCe and **participated by all partners**, with a person from each partner working in the Communication Task Force (CTF).

Being so, GBCe, as the WP leader, is the main contributor of the content provided in this deliverable. The members of the CTF are mainly contributing to the details concerning the local activities and to the general procedures defined.

1.4 Relation with other activities in the project

Proper development and smooth communication with the rest of the project's WP and activities are essential for the successful design and execution of the communication strategy.

Since the start of the project, a working group (Communication Task Force) has been set up with at least one person representative of each partner to contribute to the design of the communication strategy. A total of 9 online meetings were held during the first year.

It has been very useful to draw the communication strategy the internal relationship and frequent meetings with WP's leaders, to know the progress of the development of the project, key to adapt the communication strategy.

Throughout the project, it will be essential to implement both the communication strategy and the dissemination strategy, to know the progress of technical developments (e.g. industrialisation of heating, cooling and DHW units, development of the smart energy management system or details about the progress in each demo implementation, specially from the point of view of residents).

2. Objectives of the Communication Strategy

The key goal of **WP7** 'Dissemination and Communication' is **to support the general HAPPENING objectives** via best practice communications, ensuring thus HAPPENING project milestones is brought to the attention of, and where possible actively involves, as many relevant stakeholders as possible and, ultimately, encouraging the installation of the technology developed by the project.

It is convenient at this point to briefly explain the distinction between (i) dissemination (addressed in D7.2), (ii) exploitation, and (iii) communication. In general terms, according to the IPR Helpdesk in collaboration with the European Commission (EC)², these three terms are defined as follows:

- (i) **Dissemination on projects** is the way the results are disclosed to the public by any appropriate means (other than those resulting from protecting or exploiting the results).
- (ii) **Exploitation on projects** is the utilization of results in further activities other than those covered by the action concerned, or in developing, creating, and marketing a process, or in standardization activities.
- (iii) **Communication on projects** is a strategically planned process that starts at the outset of the project and continues throughout its entire lifetime, aimed at promoting the action and its results. It requires strategic and targeted measures for communicating about the action and its results to a multitude of audiences, including the media and the public and possibly engaging in a two-way exchange.

Based on the definitions above, WP7 will contribute to achieving the objectives of the project by defining wide strategies to communicate efficiently and effectively (communication strategy D7.1) and disseminate (dissemination strategy D7.2) the project results to maximize their impact, especially to targeted audiences.

² Source: https://intellectual-property-helpdesk.ec.europa.eu/regional-helpdesks/european-ip-helpdesk_en

2.1 Alignment and contribution to project objectives

Concurrently, the project objectives are each met through one WP, but also through a range of novel and engaging activities across WPs (see also D7.2). These are the main objectives of the HAPPENING project:

- **Objective 1:** To demonstrate a highly versatile, scalable, and replicable solution package for buildings heating and DHW system retrofitting allowing 70% of renewable energy fraction.
- **Objective 2:** Development of near-zero planning, implementation, and operation processes.
- **Objective 3:** Development of new financing and business models specific for building renovations.
- **Objective 4:** Unleash the full potential of the solutions developed through dedicated exploitation, dissemination, and communication activities.

As explained above, the best practices applied to communication actions **promote the diffusion of the general HAPPENING objectives**, ensuring thus HAPPENING project milestones is brought to the attention of, and where possible actively involves, as many relevant stakeholders as possible and, ultimately, encouraging the installation of the technology developed by the project.

2.2 Communication objectives

Going in detail, the communication objectives of HAPPENING are four, each of which requires accompanying communications activities:

- **Objective 1:** Facilitate a short time to market of the project results, focusing on the feasible technical solution and economic scheme of renewable retrofitting solution that offer HAPPENING.
- **Objective 2:** Overcome market barriers related to awareness and financing possibilities of renewable retrofitting to unlock its untapped potential.
- **Objective 3:** Support ESCOs' models with dedicated dissemination activities.
- **Objective 4:** Design and execute tailored communication strategies for the different stakeholders: European industry, public administrations, and the public at large.

3. Target groups: identification, strategic objectives, and communication tools

The project addresses not just a direct audience but also reaches out to a potential audience via advocates e.g stakeholders and consortium members. Based on targeted audiences defined in HAPPENING Grant Agreement, this Plan identifies and analyses a set of target-communities, and classifies them into several groups according to the influence and mutual dependence that exists between these communities and the communication tools to impact them.

The communication and dissemination target audiences are defined in the Table 4.1 below:

Targeted audience		Project objectives	Communication tools ³
Group	Sub-group		
Stakeholders	<ul style="list-style-type: none"> • Building owners • Building administrators • Financing entities • Investors • Installers • Planners • Utilities • ESCOs • Certification bodies 	<ul style="list-style-type: none"> • Leverage environmental and social benefits of HAPPENING solution (A low carbon heating and cooling system). • Increase reliability and understanding on RES retrofitting solutions. • Unleash its full potential through real demonstrations. • Demonstrate cost-effectiveness and efficiency on the performance of RES to cover 70% of whole energy demand. • Collect feedback on renewable energy supply systems product specifications and market needs. 	<ul style="list-style-type: none"> • Public deliverables • Flyers • Events (presentation of results, fairs)

³ Do not confuse communication tools with dissemination tools, that are detailed in the “D7.2 Dissemination strategy and results”.

Targeted audience		Project objectives	Communication tools ³
Group	Sub-group		
Public administration	<ul style="list-style-type: none"> • Municipalities • Energy agencies • Building regulators • EE labelling entities 	<ul style="list-style-type: none"> • Increase reliability, knowledge, and usage of RES for retrofitting in their activities & associated regulations. • Collect feedback on retrofitting specifications and regulations. • Leverage environmental and social benefits of HAPPENING solution (A low carbon heating and cooling system) 	<ul style="list-style-type: none"> • Public deliverables • Flyers • Events (presentation of results) • Networking activities (Workshop /Events in general)
Market / Industry	<ul style="list-style-type: none"> • Industry associations • Technology developers 	<ul style="list-style-type: none"> • Facilitate communication/networking. • Collect feedback on renewable energy supply systems market needs. • Leverage environmental and social benefits of HAPPENING solution (a low carbon heating and cooling system) 	<ul style="list-style-type: none"> • Public deliverables (presentation of results) • Flyers • Events (presentation of results) • Networking activities (Workshop/events in general)
Research community	<ul style="list-style-type: none"> • Academia • RTD centres • R&D departments of big enterprises 	<ul style="list-style-type: none"> • Guarantee knowledge transfer 	<ul style="list-style-type: none"> • Articles • Public deliverables (presentation of results) • Flyers • Events (presentation of results) • Networking activities (Workshop/events in general)
General public	<ul style="list-style-type: none"> • Citizen/users 	<ul style="list-style-type: none"> • Raise awareness and engagement from citizens. • Promote vision change, transmit the reliability and advantages of RES for retrofitting. • Leverage environmental and social benefits of HAPPENING solution (a low carbon heating and cooling system) 	<ul style="list-style-type: none"> • Online content (articles, interviews, videos...) • Public deliverables • Flyers • Events (presentation of results) • Networking activities (Workshop /Events in general)

Table 3.1: Target groups & key stakeholders, strategic objectives, and communication tools

These audience groups will be addressed and impacted via specific Call To Actions (CTA's) defined in deeper detail in the deliverable "D7.2 Dissemination strategy and results".

4. Communication strategy and results of the first activities

The strength of the HAPPENING project lies within the perspectives contributed to it by the (i) consortium members and (ii) targeted and potential audiences. Maximising the impact of these perspectives will need **cross-cutting communication tools** to provide consistency with the project.

4.1 Communication strategies for project activities

The communication strategy has been elaborated during the first 12 months of the project, in which the communications objectives focused on defining and designing effective dissemination and communication strategies for the various market beneficiaries.

The communication strategy is defined by answering a series of questions (based on the 5 Ws of Journalism) which are these selected 5: What, Why, How, Where and Who⁴.

The Table 5.1 presents the key aspects of the of the communication strategy:

Communication strategy	
What	A specific range of actions in which the project will leverage their impact at local, national and European level.
Why	To boost project impact in terms of how useful/valuable the novel HAPPENING concept will be for the targeted stakeholders.
How	Via communication tools including public deliverables.

⁴ The Communication leaders decided not to include 'When' as a question to be answered based on the detailed dates the tools will be used.

Communication strategy	
Where	To be presented to potential stakeholders via events related to the project and external events in which HAPPENING will be presented. These include: <ul style="list-style-type: none"> • Workshops at local level where the pilot project cases will be presented to engage local communities • Mid Conference event, where project insights will be highlighted
Who	Stakeholders, Public administration, Market industry, Research community and public

Table.4.1 Project communication strategy

Specific actions and tailored channels and tools to disseminate the activities according to objectives will be tackled on the deliverable “D7.2 Dissemination strategy and results”.

4.2 Results of the first communication activities

The objectives of the 1st year in WP7 have been to create a coherent and assessed project identity, an initial assessment of the target audience and groups and define key messages for specific stakeholders. This has been materialized in the Branding and Project Identity, Communication Guidelines and Templates, Channel, Impact and Metrics definition, among others.

During the first months of the project, some communication actions have already been executed, as detailed in the following Table 2.1:

Communication Action	Launched / Month
Kick off Meeting	M1
First Communication Task Force (CTF) monthly meeting	M1
First press release, launch of the project	M2
Branding and Project Visual Identity	M3
Website	M6

Communication Guidelines, channels, Impact and Metrics definition	M12
Communication and dissemination strategy and results Deliverables (D7.1 and D7.2)	M12

Table 4.2: Communication Actions

Activities included in the dissemination strategy (D7.2) are excluded of this table, focused on communication strategy.

The templates, guides and other tools have been produced for the Consortium members to enhance the project's visibility and outreach, especially to targeted and potential audiences. Thus, various communication tools have been presented in terms of facilitating Consortium partners to communicate and disseminate HAPPENING itself with the most accurate tools and produced materials.

The vast majority of activities are planned from the second year of the project; therefore, this section will cover the planned strategy to communicate each activity related to HAPPENING.

Applying the same 5 questions methodology applied for the definition of the communication strategy, in the following tables the details about the "Project branding guidelines", the "Public deliverables templates" and the "Communication and dissemination strategy and results Deliverables (D7.1 and D7.2)" are shown:

Project branding guidelines

<i>What</i>	A range of guidelines which contain the branding information related to the project. That includes: Logo and Brand Guidelines, PowerPoint and Microsoft Word templates and their instructions to be used.
<i>Why</i>	To ensure that project communications and actions which must be developed and disseminated on the HAPPENING activities and events are available and easy to be applied to all partners during the project's lifetime.
<i>How</i>	Via internal emails and monthly online communications groups meetings.
<i>Where</i>	To be used in events (external or related to the project) in which HAPPENING is presented to the stakeholders, targeted audiences or potential persons of interest. As well as internally (meetings, agenda, minutes...) and for the project's deliverables.
<i>Who</i>	Consortium partners

Table.4.3 Project branding guidelines

Public deliverables templates

<i>What</i>	A range of documents have been produced to facilitate project communication following HAPPENING branding principles.
<i>Why</i>	As these documents are the chosen way to present project results, is a way to keep all the most relevant documents to increase project impact.
<i>How</i>	All documents will be online and accessible to all partners as well as the audiences. Any improvement or change will be communicated through the monthly internal communication groups meetings.
<i>Where</i>	To be used in events (external or related to the project) in which HAPPENING is presented to the stakeholders, targeted audiences or potential persons of interest. To be disseminated via internal partners networks, newsletter and social media.
<i>Who</i>	Consortium partners

*Table.4.4 Public deliverables templates***Communication and dissemination strategy and results Deliverables (D7.1 and D7.2)**

<i>What</i>	Roadmap for dissemination and communication strategy and actions as well as present relevant results to track and be improved in the developed strategies on M24.
<i>Why</i>	Leverage the project impact needs to follow a designed communication and dissemination strategies, choosing the best channels and tools to impact the targeted audiences in terms of engagement and events/call to actions attendance.
<i>How</i>	Creating a specific strategy with regards to communication, dissemination, and exploitation results.
<i>Where</i>	To be a guideline to Consortium partners and third parties which are interested in boosting project visibility.
<i>Who</i>	Consortium partners

Table.4.5 Communication and dissemination strategy and results deliverables

5. Internal communication

The internal communication describes mechanisms that will be used throughout the project in order to ensure the quality level of an internal communication and it has already been described in the deliverable “D1.1 Quality Assurance Plan”, within the “WP1 Project management and coordination”.

Several internal communication channels and tools are on disposal to the whole Consortium, such as SharePoint repository, a contact list and emails, and regular project meetings, as it is deeply explained in “D1.1 Quality Assurance Plan”.

The **continuous communication between all the partners of the Consortium** is one of the keys that guarantees the success and the accomplishment of the ambitious objectives of the HAPPENING project.

6. Evaluation and monitoring of communication strategy

Evaluation and monitoring the results generate evidence of communication strategy success and impact over time. It is necessary to set a monitoring system to establish robust and objective results which help the communication strategy to be implemented aiming at increasing the project objectives (see section 2.1).

This section will emphasize ways and indicators to exploit and evaluate the results in three levels: (1) communication level, (2) dissemination level and (3) activity impact level. This last point will have a deliverable itself to present the results thus, this section will briefly explain the framework, focusing on communication and dissemination issues.

In order to select the most appropriate key performance indicators (KPIs), which will provide valuable data results (i.e. to compare the initial expected scope with the final results), this selection will be based on:

- Identify whether a strategy is being applied on the ground as expected,
- Addressing any implementation problems of a specific action,
- Recognize whether further action is required to ensure that it can achieve its intended objectives.

The current communication plan will be updated in one year's time, applying all necessary improvements which can be used to maximise HAPPENING results. KPIs will include the following quantitative and qualitative aspects⁵:

- Quantitative: Number of clicks, likes, shares, tags, video views, new followers, profile visits, engagement rates, website traffic, entrance page, website users, etc.
- Qualitative: Types of comments received, their tone, the number / kind of people reached, the types of followers, impressions, etc.

Although the monitoring framework will have specifications on each channel, tools and project activities detailed on "D7.2 Dissemination strategy and results", it is important to specify that the results will be supervised by Consortium members, concretely via Communication Task Force meetings and the following communication activities and tools.

⁵ The selected KPI's are based on WP7 'Guidance on C&D Impact Reporting' confidential deliverable.

6.1 Evaluation and monitoring of communication activities

The communication activities ongoing in the project are:

- **Consortium internal meetings:** With the objective to streamline all live issues and to keep all partners informed about daily, these meetings will share information in terms of WPs updates, upcoming and past events, activities and ways, and the partners will join efforts to develop the tasks and accomplish the project objectives.
- **Work Package meetings and reporting** (public and confidential deliverables): HAPPENING Work Packages are diverse, aiming at different objectives, targets and specific KPIs for the purpose of monitoring and reporting. A tailored way to monitor their results will be via public and confidential deliverables, in which Consortium partners, as well as targeted audiences, will be aware of the HAPPENING results and their measure of success.
- **Updated Communication Plan for M24:** The results of the strategy and actions enclosed in this report will increase dramatically in the second year (M24) when the plan will be revised and expanded into “D7.3 HAPPENING dissemination and communication work and results”. Communication activities in the second year will focus, among others, on:
 - (1) raising awareness of the project through online channels (i.e social media content and outreach materials) and pilot project activities
 - (2) building trust in the project and increasing the audience engagement
 - (3) strengthening the relationships with other projects

These priorities as the project development and results will culminate with the Final Conference at the end of the project.

6.2 Evaluation and monitoring of communication tools

There are some, both internal and external, communication tools already implemented or to be implemented in the project:

- **The Stakeholders survey:** In terms of getting valuable insights about the project and / or the stakeholders demands, a series of surveys will be circulated through written questionnaires and additionally by phone, when the written surveys do not receive a high return rate. Starting on M11, the analysis of these interviews will be used to fine tune the communication messages to be sent.
- **Shared spreadsheet:** To keep the Consortium informed about partner events, in terms of organisation, and provide ways to improve events impact, an online and private spreadsheet has been shared with Consortium members in which they can share all common information.
- **SharePoint:** With the goal of gathering all the internal relevant information about the project workflow and procedures to achieve the activities and objectives, a SharePoint repository, available since the first months

of project, was created with the agreement of all partners, in which WP leaders and partners contribute with their tasks updates to preserve the correct project timeline commitment.

6.3 Evaluation and monitoring of the project activities

Led by RINA-C, the exploitation and replication of the project is detailed on WP6, aiming at providing innovative pathways to disseminate HAPPENING demonstrated concepts in the project at local, national, and European level. This demonstrated concepts will be developed via pilot project actions to evaluate its viability in the current market.

Although these pilot project activities will be disseminated via online channels and tools (see D7.2), their results and standardization will be exploited and monitored via guidelines to impact potential stakeholders, including the following: proven social benefits of HAPPENING solution; the most appropriate business models towards the proposed concept; and regulatory and non-technical framework.

The results will be presented, as well, in several HAPPENING workshops and external related events.

7. Conclusions

In conclusion, this deliverable delves into the key aspects of the communication strategy planned for HAPPENING with the objective of being an essential guidance for consortium partners communications during the first year of the project.

The established goals linked to each targeted audience groups as the actions accomplished during the first year of the project facilitated consortium partners' work on communications and ensured a successful implementation of communication matters.

This plan fosters to be the baseline of further actions and activities addressed on the second year of the project and beyond, being implemented based on lessons learnt on "Task 7.3 Development and execution of D&C activities".