



SmarterEPC

D6.1 Communication and Dissemination Plan



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Document Information

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Acronyms

Acronyms	Description
AI	Artificial Intelligence
BACS	Building & Automation Control System
C&D	Communication and Dissemination
CINEA	European Climate, Infrastructure and Environment Executive Agency
DBL	Digital Building Logbook
EC	European Commission
EPC	Energy Performance Certificate
GDPR	General Data Protection Regulation
M	Month
ML	Machine Learning
R&I	Research & Innovation
SRI	Smart Readiness Indicator
WP	Work Package
WPL	Work Package leaders

EXECUTIVE SUMMARY

This public report (D6.1) sets the strategy at the basis of the **LIFE SmarterEPC project on Communication and Dissemination activities**. This report lays the foundation of the whole work that WP6 (Sustainability, replication, and exploitation of project results) is called to perform in the project.

This first release of the Communication and Dissemination Plan is prepared at the project beginning and defines the project's overall strategy. This analysis is introduced by a critical positioning of SmarterEPC according to the spirit of the LIFE Programme, the overall European Commission and CINEA principles at the basis of the EU Communication and Awareness of EU-funded actions as well as the project objectives and impacts.

It identifies the list of target groups setting-up the SmarterEPC ecosystem, giving examples and making connections to the activities and types of impacts the consortium aims to deliver to experts and non-expert stakeholders.

Based on that, the selected physical and online channels, materials and initiatives to be produced during the 3-year project (from M1, October 2023 to M36, September 2026, and beyond) are described, paired with the Communication and Dissemination KPIs established by the Grant Agreement and split on an annual basis.

In order to perform the Communication and Dissemination activities, responsibilities at the consortium level have been defined, thanks to an Operational Team, a list of procedures, supporting tools and a targeted Monitoring and Evaluation process.

This report is subject to revision by R2MI, in the role of WP6 Leader, anytime major changes are decided at the consortium level, while periodic Communication and Dissemination plans and reporting are expected on a 4-6 months and a yearly basis, respectively.

Special attention is given to the collaboration with all the other project WPs (from WP1 Project Management to WP5 Tools and Service for faster EPC and SRI uptake), with the objective of ensuring a smooth information flow between the activities and outcomes of the project and the related communication (for project promotion and reach out) and dissemination (for targeting to specific audience with public accessible outcomes) initiatives and in a timely manner with regards to key policy, standardisation and market trends.

The ultimate goal for the SmarterEPC C&D Plan is to be able to efficiently and effectively maximise the project's expected impacts from M1 through M36 and after its end (as it will be mirrored by two final reports required for LIFE projects, the Layman Report and After-LIFE Plan). Communication and Dissemination activities will be aligned with the market and commercial Exploitation strategy of the consortium, that is expected to be elaborated with all interested partners at a later stage of project Year 1.

Introduction

Purpose of the document

Deliverable 6.1 SmarterEPC Communication and Dissemination Plan (C&D Plan, in short) is the first, key report informing the whole strategy of **WP6 (Sustainability, replication, and exploitation of project results)**, which started since the project kick-off (M1, October 2023) and is planned to be implemented until the end of the project (M36, September 2026), with additional activities and impacts expected after it.¹

In detail, **Task 6.1 (Publicity and dissemination policy, planning and review)** is designed to set up the SmarterEPC C&D Plan as a cross-cutting guideline accompanying the whole project and enabling it to reach, in an effective and timely manner, the SmarterEPC Stakeholder Ecosystem, consisting of the members of several target groups located in the EU Countries, as later described in this report.

Hence, the D6.1 features the first version of this plan having the role of a **full strategy**, as proposed by R2MI and validated at the consortium level. This deliverable intends to:

- Make reference to the LIFE Communication Guidelines and its synergies with both the SmarterEPC project objectives and the WP6 C&D work plan;
- Establish the framework of C&D project activities for the 3-year project;
- Introduce and describe all the online and offline materials, channels and activities selected by the consortium as the most suitable for reaching the highest possible impact of the SmarterEPC project, as well as the expected C&D KPIs on an annual basis;
- Set the processes to plan, implement, monitor and report the activities during the project.
- Support the promotion of the Key Exploitable Results in the project afterlife.

Contribution of partners and note on methodology

R2MI, as leader of WP6, provides these guidelines in line with its sound expertise in the valorization and promotion of Research & Innovation (R&I) results derived from EU-funded projects linking academics, innovators and professionals of the building market sector. As validated by all project partners, since the project's outset **all partners are called to take this report into consideration**, as the involvement of the whole consortium is an essential factor to ensure that the project can be well promoted and results and initiatives reach the needed target groups in a timely manner.

Besides, **all partners are requested, on a periodical basis, to contribute with inputs as well as ideas and suggestions**, like relevant opportunities for SmarterEPC promotion and

¹ Information on this will be provided by a number of contributions, following the Replication and upscaling strategy (as preliminary identified in the Grant Agreement, Annex 1 Part B, p.37). This includes the pathway that will be designed by the consortium in occasion of the WP6 deliverables - see D6.4 Exploitation Report and IPR Protection Plan, and the same After-LIFE Plan, mandatory to be prepared by the consortium before the project closure.



dissemination (at in-person or online events, at national, European and international level), given the scope of the project to favour a hands-on market uptake of innovative EPC and SRI schemes across Europe, and in line with T6.3 (Exploitation activities, IPR management and post-project sustainability).

Besides, periodic connections between WP6 and the members of the **SmarterEPC External Advisory Board** (coordinated by R2MF) are expected to increase, in a win-win approach, the flow of information and exchange of know-how and expertise for the whole consortium to benefit from. Since they consist of top level, senior experts (both academics and professionals), they are well positioned to contribute with an external view and linkages to achieve sustainable and replicable project impacts.

1 SmarterEPC project within the LIFE Programme

1.1 Analysis of LIFE Grant Agreement Rules and Communication Guidelines linked to SmarterEPC project

Since the launch of the LIFE Programme more than 30 years ago (May 1992²), among the key features of the programme there was the goal for experts working in different disciplines in LIFE-funded projects to promote and valorize research results among citizens, associations and NGOs working on maintaining and preserving the natural environment and local ecosystems. Since then, a lot has changed and the programme now covers topics on energy efficiency and smartness in the construction sector, like SmarterEPC, which is under the category of LIFE - Clean Energy Transition (CET). Indeed, LIFE CET has the key objective of funding projects to create market and regulatory enabling conditions for the clean energy transition, with a focus on non-technological aspects (like operating a change in habits and mentality, offering new approaches and methodologies to embrace the challenges ahead, and offering a pragmatic contribution in the world, among experts and citizens). These projects intend to contribute to making the shift to a circular, energy-efficient, renewable energy-based, climate resilient economy not the attempt of a “golden hour”, but long-term and consistent for future generations.

Even with this novel approach, the LIFE Programme has not changed its C&D backbone and considers of utmost relevance that all projects pay specific attention and devote efforts to **communication, promotion and valorization of the project activities and outcomes** to a multi-disciplinary and as wide and transversal as possible audience.

The Grant Agreement of a LIFE project foresees, at **Art. 17 COMMUNICATION, DISSEMINATION AND VISIBILITY**, the rules that the consortium as a whole and each partner has to follow:

17.1 Communication — Dissemination — Promoting the action

*[...] the beneficiaries must promote the action and its results by providing targeted information to **multiple audiences** (including the media and the public), in accordance with Annex 1 and in a strategic, coherent and effective manner.*

*Before engaging in a communication or dissemination **activity expected to have a major media impact**, the beneficiaries must inform the granting authority.*

17.2 Visibility — European flag and funding statement

*Unless otherwise agreed with the granting authority, **communication activities** of the beneficiaries related to the action (including media relations, conferences, seminars, information material, such as brochures, leaflets, posters, presentations, etc., in electronic*

² Source: https://cinea.ec.europa.eu/programmes/life/history-life_en.

form, via traditional or social media, etc.), **dissemination activities and any infrastructure, equipment, vehicles, supplies or major result funded by the grant must acknowledge EU support and display the European flag (emblem) and funding statement (translated into local languages, where appropriate):**

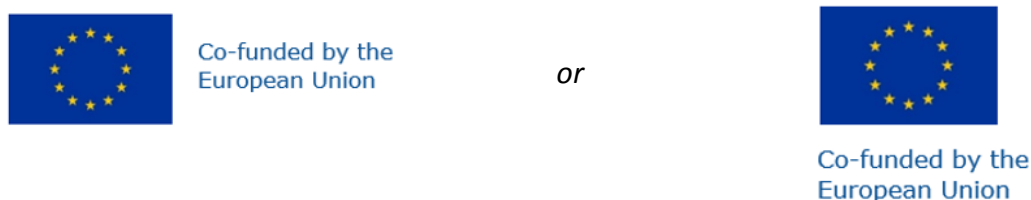


Figure 1: Available options of European flag (emblem) and funding statement (Source: EC/CINEA)

17.3 Quality of information — Disclaimer

Any communication or dissemination activity related to the action must use factually accurate information. Moreover, it must indicate the following disclaimer (translated into local languages where appropriate):

“Funded by the European Union. Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or CINEA. Neither the European Union nor the granting authority can be held responsible for them.”

[...]

17.5 Consequences of non-compliance

If a beneficiary breaches any of its obligations under this Article, **the grant may be reduced** (see Article 28). Such breaches may also lead to other measures described in Chapter 5.

Furthermore in the Grant Agreement, under **ANNEX 5 - SPECIFIC RULES**, additional rules detail Art. 16, 17 and 18, impacting the C&D activities of SmarterEPC.

Besides what is stated in the GA, the LIFE Programme and related funded projects have, so far, always distinguished **four typical communication activities**. The reason to recall them in this report, at the beginning of the SmarterEPC Communication and Dissemination Plan, is because the consortium considers them key to be part of the project strategy and periodic planning of activities along the project duration and after its closure. For this reason, examples linked to SmarterEPC have been included under each of the four types of activities, as follows:

1 - Engagement of all types of stakeholders: it is mandatory to reach out to both expert target groups and non-expert people, along the full life-cycle of the project (from the kick-off to its end and beyond its closure). As detailed in the following paragraphs, these principles and best practices have informed this plan since its definition phase, as they inform all the choices that make up a consistent and well-designed C&D Plan:

- the *types of messages and contents* promoted;
- the selection of the *physical and digital channels* able to deliver those messages and contents in the most efficient manner, and in line with the project objectives and the expected impacts³;
- the *timing of the communication, promotion and dissemination of activities and results* to be done, thinking in synergy with both project-related activities (like start of an activity; availability of results to be disseminated) and external initiatives positively and/or negatively influencing the project life (e.g. a new legislation at national and/or EU level impacting the legal and regulatory framework of a given sector, like the new EPBD recast⁴ and data collection via digital tools for promoting energy efficiency and sustainability of buildings in the medium and long-term period in Europe; a new standard at EU level setting the basis for a methodology to measure energy performance and smartness of buildings, as for the same EPC and SRI schemes, followed by debates among experts and gradual adoption of legislative framework and measures in a number of EU Countries⁵; etc.).

2 - Networking: for LIFE projects, making synergies and networking with other LIFE projects as well as projects and initiatives funded by other national and/or EU programmes is mandatory. The online LIFE Guidelines⁶ offer a number of examples in this regard (e.g., visits in person, hybrid events, meetings for exchanging best practices among experts, webinars open to a large audience as part of a big event, etc.). What is relevant for the LIFE Programme is to look for an appropriate number of projects (ongoing or completed) to network with since the very beginning, so that opportunities for cross-fertilization are higher. This topic is covered in more detail under the following paragraph 2.3 (*Joint communication and dissemination with other projects of the Next Gen EPC cluster and SRI cluster*).

3 - Laymans' Report at the end of the project: once the project is finalised, the consortium is called to prepare and publish a Layman's Report. This consists of a 5-10 page long report, in English and another relevant language (depending on the composition of the consortium and the geographic relevance of the project activities in the EU). It aims to summarise the work and results of the project, as well as its long-term environmental benefits.

The target of the report is a general audience, thus jargon and difficult sentences should be avoided or at least limited, and care should be paid to a graphic level (catchy images, results from interviews with a good representation of different people in different countries, etc.), as the goal is to have a document that can make an impact to a wide audience and retain the nice results of the project for the future. Additional requirements for the report to prepare and disseminate are detailed on the dedicated LIFE programme page.

³ Among the key expected impacts of SmarterEPC there are: Improved understanding of joint EP and smart readiness assessment with concrete and inspiring paths for implementation; Clear and user-friendly EPC / SRI tool offer; Contribution to the uptake of the SRI (e.g. in relation to recast of the EPBD) – and more broadly, to the uptake of smart technologies in buildings.

⁴ Source:

<https://www.consilium.europa.eu/en/press/press-releases/2023/12/07/fit-for-55-council-and-parliament-reach-deal-on-proposal-to-revise-energy-performance-of-buildings-directive/>

⁵ See the ongoing work done on this by the European Commission thanks to the SRI Platform:

https://energy.ec.europa.eu/topics/energy-efficiency/energy-efficient-buildings/smart-readiness-indicator_en

⁶ Source: https://cinea.ec.europa.eu/programmes/life/communication-and-gdpr-rules_en

For the SmarterEPC project, this report will be one of the final materials that will be promoted, besides the Final SmarterEPC Report presenting key results, main lessons learnt and a number of recommendations at policy/regulatory, technical and socio-economic and market level for the full adoption of the integrated EPC-SRI approach and schemes.

4 - After-LIFE Plan: mandatory for all LIFE-funded projects, this plan consists of a separate chapter of the final project report. The plan offers the opportunity for the consortium to make a (forward-looking but very practical) exercise in terms of: 1) expected activities that can realistically be implemented thanks to what has been achieved by the project; 2) positive, virtuous impacts can be expected in the near-medium and long-term future, based on that.

For the aim of the SmarterEPC C&D strategy, the activities described in the After-LIFE Plan might include a number of synergic actions with future EU-funded projects that might follow up on what was done in SmarterEPC and focus on the EPC and SRI schemes for buildings (no matter if residential, commercial, public ones), as well as on linked methodologies and new paradigms, such as the Digital Building Logbook (DBL), the use of Artificial Intelligence (AI) and Machine Learning (ML), among others. Besides, partners are called to define how they intend to continue to communicate the SmarterEPC results after the end of the project. As an example, this might already include the chance for some experts of the project to continue operating in working groups setting new policies and/or new standards in the sector, as well as collaborating with the experts of the SmarterEPC Advisory Board in new initiatives, international groups and platforms.

All the activities listed in the After-LIFE Plan are to be ambitious but also achievable. For this reason, a number of sources of funds (local, national or EU origin) are to be identified at the consortium level and reported in the After-LIFE Plan as well. The whole consortium is also deemed responsible for meeting the contractual requirements of the plan.

Given the overview just presented on the four C&D key areas for a LIFE-funded project, the consortium is aware of the importance of referring to the **LIFE Communication Guidelines** available online and eventual updates set by the CINEA and the European Commission in general, on a periodic basis. The Guidelines list a number of key functional and non-functional requirements that communication, dissemination and engagement of stakeholders need to follow, including:

- The *EU acknowledgement of a LIFE-funded action* (e.g, as a whole project, or an activity like an event, online webpage or social media channel, as well as a place, etc.) with the LIFE logo and funding statement;
- *Data Protection and reference to the EU GDPR rules*⁷, which has to be considered for all the communication, dissemination and engagement activities (including market exploitation) conducted by the project beneficiaries during the project lifetime and beyond its closure;

⁷ Protection of personal data is a fundamental right, as per Article 8 - Protection of personal data of the EU Charter of Fundamental Rights. In EU Member States: General Data Protection Regulation (GDPR) entered into force on 25 May 2018. Each EU Member State adopted it in their national legislation frameworks, still with some national differences (e.g., on the appointment of the DPO, age of minors' consent for information services, etc.) (Source: EC/CINEA).

- A number of *useful pieces of information, examples and suggestions* for project’s websites and webpages, identification of social media channels and their use (targeted to the project, as well as the official ones from the LIFE Programme and other EU agencies⁸), tips for media coverage and further advice on planning, monitoring and evaluation of C&D activities.



Figure 2: Examples of EC guidelines for delivering C&D within Horizon Europe and LIFE projects (Source: EC/CINEA)

⁸ See https://cinea.ec.europa.eu/news-events/news/communicating-your-life-project-2022-03-09_en.

1.2 Framing the SmarterEPC C&D strategy within the project key objectives and expected outcomes

Based on the previous analysis, the SmarterEPC C&D Plan is foreseen to accompany the project activities, magnifying its expected impacts and making the best use of all the public outcomes and results of the project. The goal is to reach out the stakeholders (both experts and non-experts) the project is specifically addressing (target groups), besides the large community of R&I and market/commercial initiatives at national and EU level on EPC and SRI, and the same networks of partners gathered together and positively impacted by SmarterEPC action.

SmarterEPC is a 3-year project aiming to address several **Needs and Challenges** on the EPC and SRI schemes, among the means contributing to decarbonize the EU building stock. Needs and Challenges are the following:

1. Support the **market uptake** of EPC and SRI.
2. Explore the possible **links between the EPC and SRI**.
3. **Wide the utilisation of calculation tools** already developed under research initiatives of the building community.
4. Contribute and support the **SRI Support Center/Platform⁹** as well as **national testing committees**.
5. Improve the **collection, aggregation and data analysis procedure for EPC and SRI**, in view of national databases set-up.
6. Develop **standardised processes** for on-site EPC and SRI Audit.
7. Convert EPC and SRI into prominent **decision-making tools**.
8. Improve and align the **training of EPC and SRI assessors**.

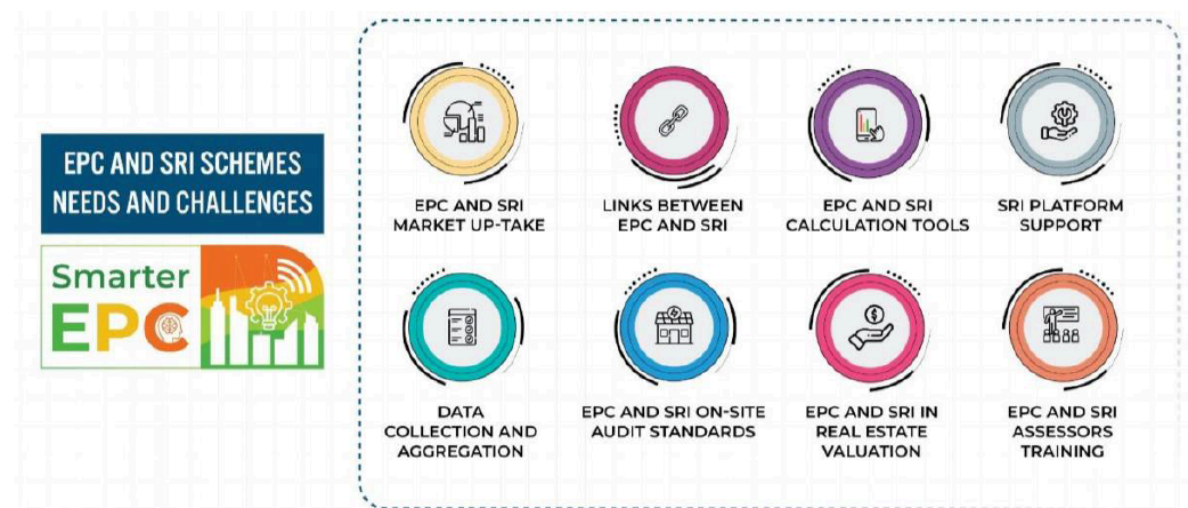


Figure 3: Needs and challenges of the EPC and SRI schemes (Source: SmarterEPC)

⁹ The one in place thanks to an EC DG ENER's SRI service contract with a number of legal entities with expertise on smartness of buildings. Link:

https://energy.ec.europa.eu/topics/energy-efficiency/energy-efficient-buildings/smart-readiness-indicator_en

The specific Key Objectives of SmarterEPC are listed as follows:

- KO#1: The **development of a digital platform** (renamed by project partners as the **SmarterEPC Hub**) that will host seven EPC and SRI calculation tools, derived from the *Next Gen EPC cluster* and *SRI cluster* to boost the uptake of the EPC and the SRI schemes.
- KO#2: The **integration** of the smart readiness aspects into the building energy performance.
- KO#3: The **development of a joint EPC and SRI audit process**, with the aim to act as the forerunner of a standardised procedure.
- KO#4: The **support of ongoing initiatives for the further development and establishment of the SRI** as the prevailing building smartness assessment among EU Member States.
- KO#5: The **simplification of procedures for EPC and SRI data collection** for the enhancement of building stock monitoring.
- KO#6: The **upgrade of EPC and SRI role for decision making** in the real estate market.
- KO#7: The enhancement and alignment of the **EPC and SRI assessors training schemes**.
- KO#8: The alignment and support of the **EPBD recast in the fields of EPC and SRI**.

Since both the Needs and Challenges and the Key Objectives of SmarterEPC define the frame of action for the C&D Strategy to operate, the consortium considered key to recall them in this report and periodic C&D Strategy updates deemed important along the project.

1.3 Joint communication and dissemination with other projects of the Next Gen EPC cluster and SRI cluster

As anticipated beforehand about the relevance of Networking for all EU-funded projects, with specific attention to the ones funded under the LIFE Programme (mainly under the **LIFE Clean Energy Transition - CET Programme**), a plan setting the basis for a continuous dialogue and exchange with other EU actions and projects has proven to increase the project promotion and its impacts among experts.

Advantages include helping the consortium to correctly position itself in the European innovation and competition landscape, limiting as much as possible redundancy in common activities across different projects, streamlining efforts and mitigating risks; increasing the magnitude of common initiatives at all levels (types and number of examples and know-how sharing, different stakeholders; etc.); setting a long-term cooperation among experts, to come up with high-level contributions for policy and regulatory frameworks (at national and EU level) and overcoming existing barriers for full market uptake of validated solutions; emphasising the reach out of common results to a wider audience throughout Europe.

Since the project kick-off (October 2023), the consortium of SmarterEPC has already joined forces with EU projects working on the EPC and SRI topics integrating the Next Gen EPC cluster and the LIFE SRI cluster. R2MF, CERTH, EPBC, EUP, R2MI, DEMO are already members of these clusters. Since December 2023, EPBC has been serving the Next Gen EPC cluster, in

the role of informal facilitator (a shared folder on Microsoft Teams has been set up and open to all partners in all of the cluster's consortia).

The following is the list of projects (possibly non exhaustive, and to be regularly updated), distinguished on domains and type of funding:

Projects advancing on the EPC domain:

Horizon 2020 funded projects:

- crossCert [link: <https://www.crosscert.eu/>]
- D²EPC [link: <https://www.d2epc.eu/en>]
- ePANACEA [link: <https://epanacea.eu/>]
- EPC RECAST [link: <https://epc-recast.eu/>]
- EuB SuperHub [link: <https://eubsuperhub.eu/>]
- E-DYCE [link: <https://edyce.eu/>]
- iBRoad2EPC [link: <https://ibroad2epc.eu/>]
- QualDeEPC [link: <https://qualdeepc.eu/>]
- Social Energy Renovations [link: <https://www.ser4impact.eu/>]
- TIMEPAC [link: <https://timepac.eu/>]
- U-CERT [link: <https://u-certproject.eu/>]
- Xtendo [link: <https://x-tendo.eu/>]

Horizon Europe funded projects

- COLLECTiEF [link: <https://collectief-project.eu/>]
- CHRONICLE [link: <https://www.chronicle-project.eu/>]
- SmartLivingEPC [link: <https://www.smartlivingepc.eu/en>]

Projects advancing on the SRI domain:

Horizon Europe funded projects

- BuildON [link: <https://buildon-project.eu/>]
- SMARTeESTORY [link: <https://www.smartestory.eu/>]
- EVELIXIA
[<https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/how-to-participate/org-details/884148017/project/101123238/program/43108390/details>]

LIFE projects

- easySRI [link: <https://www.easysri.eu/en>]
- SRI2MARKET [link: <https://sri2market.eu/>]
- SRI-ENACT [link: <https://srienact.eu/>]
- SmartSquare [link: <https://www.smartsquare-project.eu/>]

Projects advancing on both the EPC and SRI domains:

Horizon Europe funded projects:

- SMARTBUILT4EU [link: <https://smartbuilt4eu.eu/>]
- SUSTAIN Eurocluster - Cluster Building Smart Readiness Indicators [link: <https://www.sustaineurocluster.com/>]

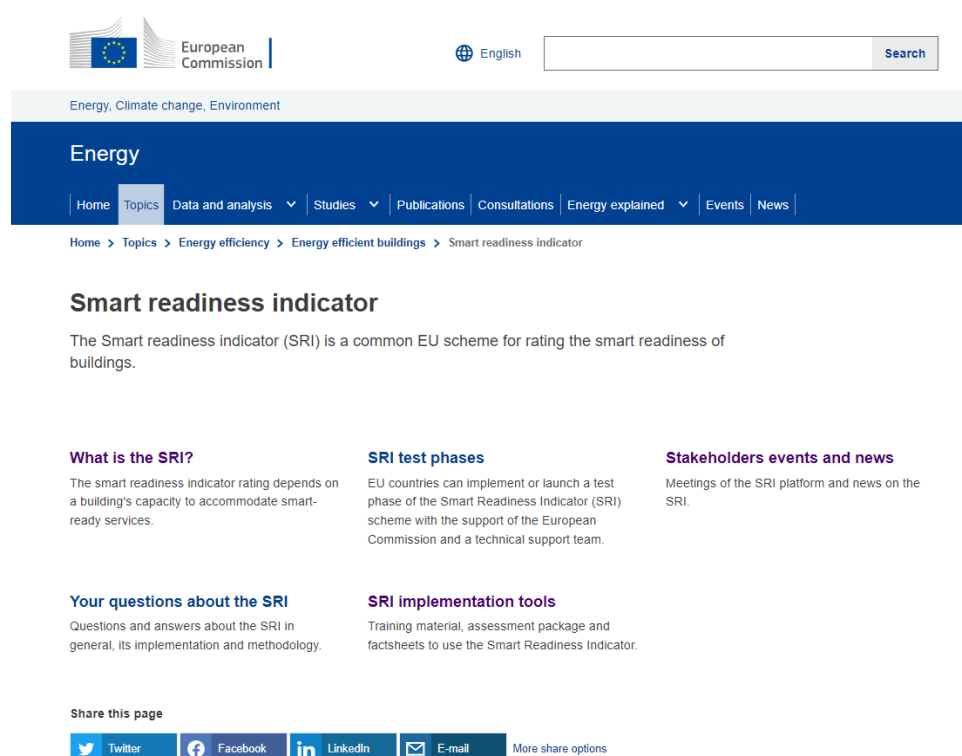
LIFE funded projects - special focus

- iEPB [link: <https://iepb-project.eu/>]

- tunES [link: <https://empirica.com/tunes/>]
- EPBD.wise [link: <https://www.bpie.eu/epbdwise>]
- OneClickReno [link: <https://www.five.es/project/oneclickreno/>]
- COSME Reno [link: <https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/opportunities/projects-details/43252405/101121032/LIFE2027>]

Besides the list of projects, there are also a number of additional initiatives that are planned to inform the communication strategy and are considered high in C&D agenda of the consortium: the SRI support initiative (as promoted by the EC, DG ENER) and the EPC and SRI Virtual Training Centre (foreseen by EPBC). They are detailed as follows:

- The **SRI platform** (hosted on the [EC DG ENER website](#)): it is the key reference for anybody in Europe looking for official information and materials at the EU level on the smart readiness indicator (SRI) rating. It is a forum for both experts and the general public looking for references on the smartness of buildings, from the latest legislative frameworks at the EU level to materials like guidelines, factsheets, and digital inputs as well as events open to the public. To perform the project activities while guaranteeing a constant connection with the SRI platform, the consortium of SmarterEPC will organise periodic, roundtable discussions and interact with the experts gathered under the SRI national committees. This will contribute to drive forward the discussion on the adoption of SRI across Europe.



The screenshot shows the homepage of the SRI Support initiative. At the top, there is the European Commission logo and a search bar. Below that, the page is categorized under 'Energy, Climate change, Environment' and 'Energy'. A navigation menu includes 'Home', 'Topics', 'Data and analysis', 'Studies', 'Publications', 'Consultations', 'Energy explained', 'Events', and 'News'. The breadcrumb trail reads: 'Home > Topics > Energy efficiency > Energy efficient buildings > Smart readiness indicator'. The main heading is 'Smart readiness indicator', followed by a brief description: 'The Smart readiness indicator (SRI) is a common EU scheme for rating the smart readiness of buildings.' Below this, there are four columns of content: 'What is the SRI?' (describing the rating depends on a building's capacity), 'SRI test phases' (describing the implementation process), 'Stakeholders events and news' (mentioning meetings of the SRI platform), and 'Your questions about the SRI' (providing a link to general questions and answers). At the bottom, there is a 'Share this page' section with icons for Twitter, Facebook, LinkedIn, and E-mail, along with a 'More share options' link.

Figure 4: SRI Support initiative homepage



- The **EPC and SRI Virtual Training Centre** (led by EPBC): under development, it is expected to offer a training and capacity building space for EPC and SRI market experts and certificate issuers, as well as anybody of the SmarterEPC community, to access a multi-disciplinary, updated selection of learning materials (e.g., recorded webinars, video pills, presentations and factsheets, etc.). The learning and training experience will cover a variety of topics, from policy, legislative and standardisation aspects¹⁰, to technical information (methodologies, digital tools and their interoperability, usability) and their link to societal aspects like technology acceptance, and awareness of decarbonization needs, challenges but also opportunities in the building sector. While sharing professional experiences and contributing to advancing the dialogue on digital tools supporting positive energy performance and smartness of buildings, the trainees will be part of a feedback mechanism promoted by the SmarterEPC partners, and linked to project activities, outcomes and their expectations for EPC, SRI and their integration via digital tools. Trainees, after the experience gained through SmarterEPC, will then be ambassadors and ready to promote Next Gen EPC and adopt SRI in European countries.

¹⁰ Among the key expected impacts of SmarterEPC there is a focus on standardisation aspects. Since the project intends to initiate an EN standard for an on-site integrated EPC and SRI audit of buildings, as part of WP4, Task 4.1 EPBC is in charge of transferring what was done by the project and organising a CEN Workshop devoted to that.

2 SmarterEPC Communication & Dissemination Strategy: the core

The following paragraphs describe the project strategy for the whole project duration (36 months) while guaranteeing that SmarterEPC impacts can be long lasting, after the closure of the project.

2.1 Communication & Dissemination objectives and Privacy

A valid reference for EU-funded projects in general for distinguishing communication from dissemination (and in relation also to exploitation) is provided by Figure 5:

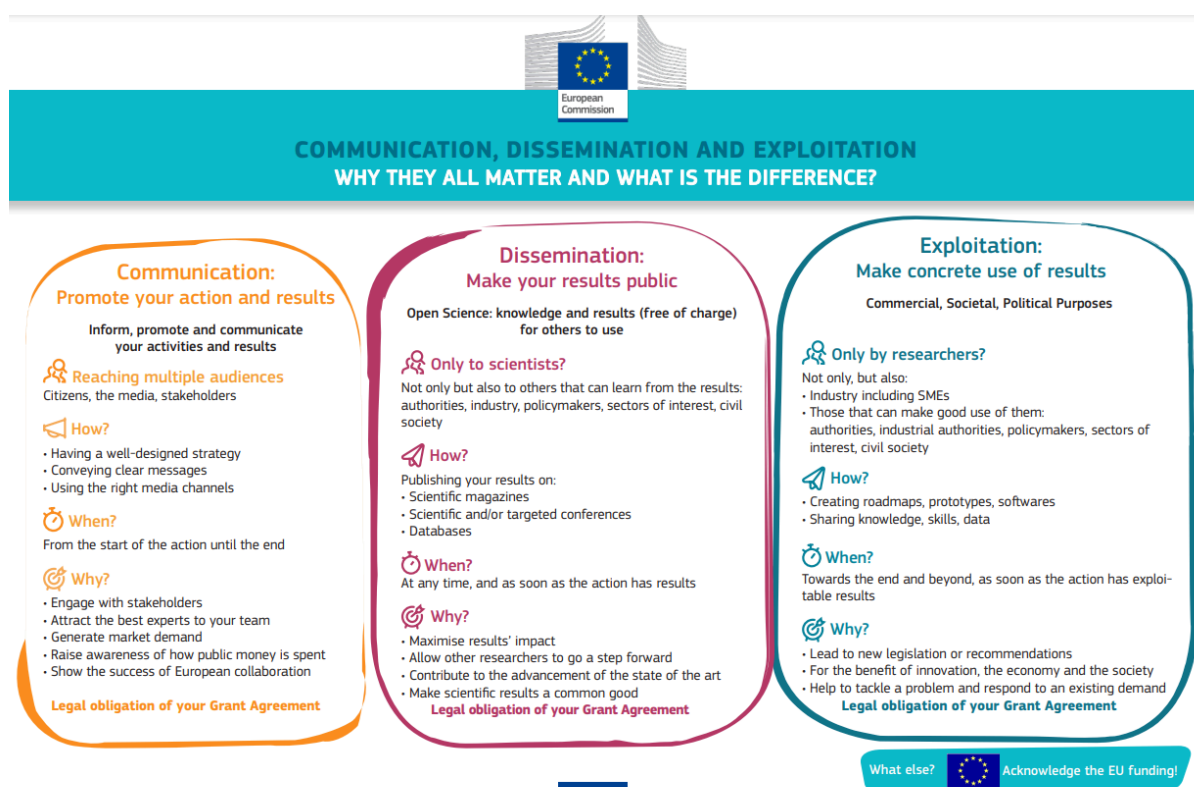


Figure 5: Quick guide on communication, dissemination and exploitation (Source: EC/CINEA)

Communication in SmarterEPC is focused on informing and demonstrating the societal and economic benefits generated by the project to a **wide range of audiences outside the core project target groups**.

Communication starts from the kick-off meeting (project outset) through the end of the project and after it, via the replication activities and After-LIFE Plan. Communication is an effort to promote both the project goals as well as partners, activities and specific initiatives leading the project outcomes. Communication will be performed via “horizontal activities”, which means reaching out to all the project audiences while setting the communication style

for a non-specialist, general public. Through communication activities, the consortium intends to:

1. Increase awareness and enhance societal perception on **how innovation can tackle emerging challenges and positively impact society**, with a focus on innovative digital tools developed to support professionals in performing EPC and SRI assessments of buildings in their daily life;
2. **Increase visibility and information flow on the role of the EU-funded research** in realising and achieving ambitious EU-side societal, economic and sustainable growth goals, with a focus on further developing, accompanying to the market and deploying new digital technologies supported by a unique offer of learning and training packages and contributions to existing/new technical standards and policies on the sector.

Dissemination in SmarterEPC is done to promote the outcomes derived by project activities (see Work Package 2 on Defining and addressing the barriers of the EPC and SRI market, and Work Package 3 on the SmarterEPC Hub), as soon as available and ready to be openly disseminated. This action can be done only if this does not pose any prejudice or create harm to one or more partners willing to “protect” a result from a market and commercial exploitation point of view. For these reasons, dissemination is targeted to specific groups, depending on their interests in one or more results.

Dissemination of relevant scientific and technical results will be done by the consortium in line with FAIR principles¹¹ for data management and Open Access rules, as well as with an eye to Creative Commons licence Attribution CC BY, and Creative Commons Zero (CC0) licences¹².

For what concerns **Privacy as per the EU GDPR¹³ and national legislations** (collection and management of personal data), according to the Grant Agreement, **each partner is deemed accountable for any personal data processed under the project** (e.g. all the activities under all the WPs, the delivery of project results, etc.).

¹¹ FAIR is an acronym standing for Findable, Accessible, Interoperable and Re-usable. As stated by OpenAIRE, they are principles describing how to organise research outputs of a project, so they can be more easily accessed, understood, exchanged and reused. Hence, they are part of a framework to follow when doing Research Data Management in a proper way and designing a Data Management Plan. Source: <https://www.openaire.eu/how-to-make-your-data-fair>

¹² The list of licences and related explanation is here: <https://creativecommons.org/share-your-work/ccllicenses/>

¹³ See the EU GDPR (Document 02016R0679-20160504 - Consolidated text: Regulation (EU) 2016/679 of the European Parliament and of the Council of 27 April 2016 on the protection of natural persons with regard to the processing of personal data and on the free movement of such data, and repealing Directive 95/46/EC (General Data Protection Regulation) (Text with EEA relevance):

<https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A02016R0679-20160504>).

The EC page on Privacy is: https://ec.europa.eu/info/law/law-topic/data-protection_en

The latest available transposition of the EU GDPR at national level (Italian case) is: REGOLAMENTO GENERALE SULLA PROTEZIONE DEI DATI, Regolamento (UE) 2016/679 del Parlamento europeo e del Consiglio del 27 aprile 2016, Arricchito con riferimenti ai Considerando, Aggiornato alle rettifiche pubblicate sulla Gazzetta Ufficiale dell'Unione europea 127 del 23 maggio 2018:

<https://www.garanteprivacy.it/documents/10160/0/Regolamento+UE+2016+679.+Arricchito+con+riferimenti+ai+Considerando+Aggiornato+alle+rettifiche+pubblicate+sulla+Gazzetta+Ufficiale++dell%27Unione+europea+127+del+23+maggio+2018>

R2MI, in the role of WP6 leader, is in charge of supporting each partner and the consortium as a whole on the correct data collection and management of any personal data processed under WP6 project activities, guaranteeing that they are managed in line with the EU GDPR and related adoption at the national level.

For C&D activities, personal data includes data of stakeholders, clients, and users (i.e. attendance lists, signatures, photos, videos, etc).

Based on that and to avoid any data breach/leak due to the SmarterEPC C&D activities and outcomes (as per Art. 3 (12) of the EU GDPR¹⁴), R2MI is aware of such provisions and prepared a targeted Privacy Statement and Disclaimer for both online (e.g., information on the project webpage; subscription to the e-newsletter; etc.) and in-person/physical activities (e.g., restricted and large events, etc.).

2.2 The SmarterEPC target audiences: Stakeholder groups and Replication Multipliers

The path forward set by the SmarterEPC consortium in this project, including objectives and expected outcomes, involves active collaboration among stakeholders, including building professionals, policymakers, and technology developers.

Besides, the media and the public are fully participating in the success of the project, by maximising the awareness about EPC and SRI tools for more efficient and smart buildings in Europe.

The first macro-group is represented by the **Expert stakeholders**. They differ in knowledge and expertise, according to SmarterEPC areas, as follows:

A- Members of public bodies and committees at the national level in charge of **defining the legal, regulatory and standard frameworks** for energy performance and smartness of buildings and related approaches and digital tools, including new developments linked to EPC, and SRI assessments (alone or in an integrated manner).

They are the referees from leading public entities, research and academic organisations, standardisation bodies and advisory and/or working groups at national and EU level.

Projects like SmarterEPC can greatly contribute to those aspects, by making experts at the national level aware about existing best practices, tested in a selection of R&D projects and ready to be rolled-out. The digital tools that will be provided and made accessible thanks to the SmarterEPC Hub are capable of collecting data from diverse sources (cadastre and other open access databases, as well as by Building Information Modeling), they can work seamlessly with other platforms and providing data elaborations at different levels of granularity and for a variety of energy and smartness purposes at the building level.

B- Professional building assessors (like young and senior designers, architects, and engineers with a proven professional certification and background in the assessment of

¹⁴ Art 3 (12) EU GDPR: “a breach of security leading to the accidental unlawful destruction, loss, alteration, unauthorised disclosure of, or access to, personal data transmitted, stored or otherwise processed.”

buildings, as well as energy auditors) **located in the EU Countries**¹⁵. In particular, professionals that, together with operators of the construction sector (like managers of building assets from the real estate and investment sector) are interested in:

1. **keeping pace with digital transition in the construction sector and remaining competitive;**
2. **keeping learning and getting updates** about new, consistent and integrated tools to do their daily business (certification of buildings, increasing energy efficiency and smartness of buildings), while receiving practical training;
3. **adopting them, and offering new, high-quality services to their clients** (e.g., a novel EPC and/or an integrated EPC and SRI rating) tenants/dwellers of residential buildings, public officers in charge of managing and/or renovation of public buildings, asset managers of residential and tertiary/commercial buildings aiming to count on consistent digital tools for decision-making and valorization of the building stock thanks to innovative ratings and datasets, etc. This gives the EU professional building assessors the chance to be more competitive in the sector they are already operating in, improving the type and quality of service they can deliver (e.g., being trained on the SRI rating) and increasing their portfolio of clients (doing faster and better), and the economic value of their work by performing energy and smartness of buildings' assessments based on consistent processes. This is in line with the legislative framework under adoption at the EU level (see the EPBD recast) and is expected to be fully integrated in each EU Member State in 2-5 years.

Currently, professional assessors have a high interest in accessing innovative tools, but low power in defining methodologies and tools. This is even more true for single professionals (not gathered in associations at the national level or members of expert working groups on standards), who have limited power to suggest improvements on such approaches, as they usually are not involved in debates on policy and or standards. SmarterEPC intends to cover this gap in several ways: incorporating their experience and suggestions collected in years of professional experience under WP2 (Defining and addressing EPC and SRI market uptake barriers); offering learning and training packages via the Virtual Training Centre (VTC) foreseen by EPB (200 Auditors trained also on SRI by M36); engaging them in the project activities in the demonstration sites, in WP4 (Demonstrating the SmarterEPC: Making the instrument work), where at least 200 EPCs and 1000 SRI certificates are envisioned to be produced during the project.

C- The experts directly affected by the technical EPC and SRI assessments, like facility managers, energy suppliers, and BACS industry.

A second macro-group consists of **Non-Expert stakeholders**, as citizens, potentially gathered in local associations and other types of NGOs, positively impacted by the project as they are the ones involved in a selection of demonstration sites where the SmarterEPC methodologies and tools will be tested. These demonstration sites were not selected at the time of the issue of this deliverable, hence they will be identified in detail at a further step.

¹⁵ A more thorough list can include: professional public advisors, inspectors or private consultants in the construction sector, accredited independent experts for building certification at energy and/or smartness level, etc.



Overall, SmarterEPC has been designed in order to promote its activities and mostly its results to a wide audience, and having the chance to count on innovative and sound EPC and SRI assessments of buildings is a matter of interest for **owners of residential buildings/tenants**, and **dwellers** across Europe.

In light of this goal, these people must be reached out by the SmarterEPC positive message that a set of new digital tools is under development and/or almost ready to enter the market, and professional assessors will be soon able to make the best out of them for having consistent certificates for:

- helping them in lowering costs of maintenance of the building in the long run,
- providing a series of documents, supporting them in the decision-making for the best solutions to be adopted to enhance the energy performance and smartness of their building and its sustainability, but in line with their purchasing power,
- increasing the market value of their building, as well as making a more balanced market estimate of their property/ies, as data from local/regional cadastre and other public authorities can be included in the measures of the assessment.

Paired with this, there are **media** (professional journalists, as well as bloggers active in the construction sector) that can echo the information and messages of SmarterEPC on paper, at events and online, and with **citizens**.

A third macro-group is represented by the **Replication multipliers**. For SmarterEPC they have been identified as follows:

- **Policy makers at the local/national level:** they are typically affected by topics of **job creation** and **upskilling of professionals** as usually these are high in their policy agendas. In their role, they are called to periodically collect data about the health of the building stock and link to programmes of local development and plans with a 5 or 10-year outlook. Policy makers are in the position to dialogue at the national level and decide to introduce financial schemes and/or funding opportunities for citizens and companies for building refurbishment and/or renovation. The SmarterEPC consortium can reach out to them to describe the opportunities provided by the SmarterEPC Hub and the chance to adapt it to further needs. Besides the EPBD recast, other EU strategies (see the European Green Deal¹⁶, the Renovation Wave¹⁷, the New European Bauhaus¹⁸, etc.) towards a more sustainable environment (including the existing EU building stock), recall the urgency to link incentives and policies to foster renovation of residential buildings in highly-polluted and densely inhabited areas (like the urban ones) and where (usually) low-energy performance houses are paired with low-income families, no jobs and energy poverty.¹⁹ Lately, this has become relevant for policy plans and novel EPC and SRI certificates can contribute to mitigating such problems.

¹⁶ Link: https://commission.europa.eu/strategy-and-policy/priorities-2019-2024/european-green-deal_en .

¹⁷ Link: https://energy.ec.europa.eu/topics/energy-efficiency/energy-efficient-buildings/renovation-wave_en

¹⁸ Link: https://new-european-bauhaus.europa.eu/index_en .

¹⁹ In EU this phenomenon is highly uneven, with the Central and Eastern European (CEE) region and the former Soviet Republic countries (CIS region) reporting the most energy-poor people – Source: https://www.bpie.eu/wp-content/uploads/2021/05/ComAct-D1.1_Overview-report-on-the-energy-poverty-concept_Final-version_UPDATED-1.pdf pag. 8.

- **Members of the European Parliament:** they are periodically working on legislative dossiers linked to a number of domains linked to SmarterEPC areas of impacts (like building sustainability, energy performance of buildings, digitization, new energy assessment schemes, update of existing standards and provision for new ones, energy poverty in urban areas, etc.).
- **Developers of digital tools applied to buildings for measuring their performances at energy and smartness levels, and researchers.** To ensure the widest possible dissemination, the consortium expects that the SmarterEPC Hub will be open source for at least 5 years after the end of the project, for non-commercial use. This will offer software developers, researchers and practitioners the chance to further interact with the Hub and for involved partners to collect useful feedback and continue improving it.
- **Market operators of the real estate sector:** project developers operating in the market sector, ESCOs, financial investors and financial institutions have an interest in novel EPC and SRI assessments. Their goal is to increase their market position and value of investments by making innovative choices in the direction of low-carbon, energy-performant, and sustainable buildings (both commercial and residential ones). Once they build, investors like real-estate companies and project developers can sell building units faster thanks to consistent EPC and SRI audits. They are not only mandatory (see the EPC), but also increasingly important as marketing tools to stand out from the competitors (passing the message that they are innovative, they care for the environment, they work for the benefit of people going to live in, they play a key role in tackling pollution, especially in urban areas, etc.). Besides legislative and marketing factors, there is a reputational one: should the EPC (and SRI) emitted not be consistent or wrong, the owner could eventually sue the constructor, with high resonance at competition and reputation level.

2.3 Communication & Dissemination Channels (online and offline)

2.3.1 Online channels: SmarterEPC webpage and social media

Specific attention by the SmarterEPC consortium will be put on having online channels periodically updated, easy to access for stakeholders, periodically updated with news, a selection of technical information (see the periodic SmarterEPC Factsheets, as per WP6, Task 6.2), links to events and initiatives promoted by other EU-funded projects, as well as by the EU and the EU Countries on advancing the role of EPC and SRI for the decarbonization of the building sector.

The king of the online channels is the **SmarterEPC project webpage:**

<https://lifeprojects.r2msolution.com/project/smarterepc/>.

R2MI opted for a single webpage (hosted on its own corporate website) instead of a full, independant website, as considered in the LIFE Programme requirements and specifically requested in the project Grant Agreement.

The choice for the webpage lies upon the long-term strategy of R2M (mainly R2MI) to have a full website that hosts all the LIFE projects whose C&D activities are managed by R2M. By having one website with different web pages, users can easily find information for the SmarterEPC project while having the opportunity to discover fellow LIFE projects on similar topics. Thanks to this decision, it is expected that the views of the webpage are maximised, domain management is optimised and the project's management during and after its conclusion is facilitated.

The website and the SmarterEPC webpage are built with WordPress, one of the most common web content management systems. Using WordPress allows more flexibility in constructing several sections of the website and the webpage and adapting the content for future needs. Moreover, being one of the most used, the majority of the R2MI team can use it which is a positive aspect to guarantee constant oversight on the webpage.

Although it is a web-page, R2MI includes all the useful aspects of a website such as social media hyperlinks, the news section, photo galleries, and the funding statement. Throughout the project and after its closure, partners, and users have the possibility to update and follow the updates of SmarterEPC in one single entry point as the webpage.

On **SmarterEPC social media**, the consortium has selected, since the project outset, two channels as the most appropriate for the target groups and introducing the SmarterEPC project while creating the community of stakeholders: **LinkedIn** and **X** (former Twitter).

- **LinkedIn** channel (<https://www.linkedin.com/company/smarterepc/>) is focused on young and seasoned professionals, active in the construction sector, by delivering consulting services and quite open to novelties, also linked to new digital tools, innovative methodologies from the research but also from companies and the market. Professionals sometimes discuss in groups and can interact in small groups, exchanging ideas and passing information on new legislations, technical references and standards relevant to their business. For SmarterEPC, LinkedIn is perfect for offering short and long inputs on the project activities, as well as gathering a group of professionals around the project.
- **X** channel (<https://twitter.com/smarterEPC26>) has been chosen because it can support directing more traffic to the SmarterEPC webpage, improving SmarterEPC “brand awareness” while having direct contact with companies and developers of digital tools.

With reference to Facebook and YouTube channels, the strategy is the following:

- The consortium is considering launching a dedicated channel on **Facebook** once the activities are more advanced, and mostly when the validation of the SmarterEPC approach will be done in a selection of building units or whole buildings in several locations in Europe. Counting on pictures and interviews collected from on-site activities and involving tenants and dwellers, professionals (EPC and SRI auditors, etc.) and the same partners can greatly impact the large and general audience of Facebook.
- SmarterEPC **YouTube** channel can be opened once a good number of videos (presenting the project, as well as video pills for learning and training packages, etc.) are available to be shown and further promoted.

All the information on the project webpage, LinkedIn channel and X page is featured on **D6.2 Established internal and external communication channels and materials** (OTH, PU).

2.3.2 Link to news portals, platforms, blogs and groups on the building and digitization

During the project, the consortium, guided by R2MI, will increase the list of news on portals, e-magazines and blogs with high reputation and consistent information the project can start to cooperate with:

- **Clean Energy Newsletter²⁰**: official EC (DG ENER and CINEA) channel devoted to news on sustainable energy from 8 EU funding programmes, project stories, events and featuring calls for proposals (open and scheduled ones). The newsletter has been recently revamped and counts on two X channels.

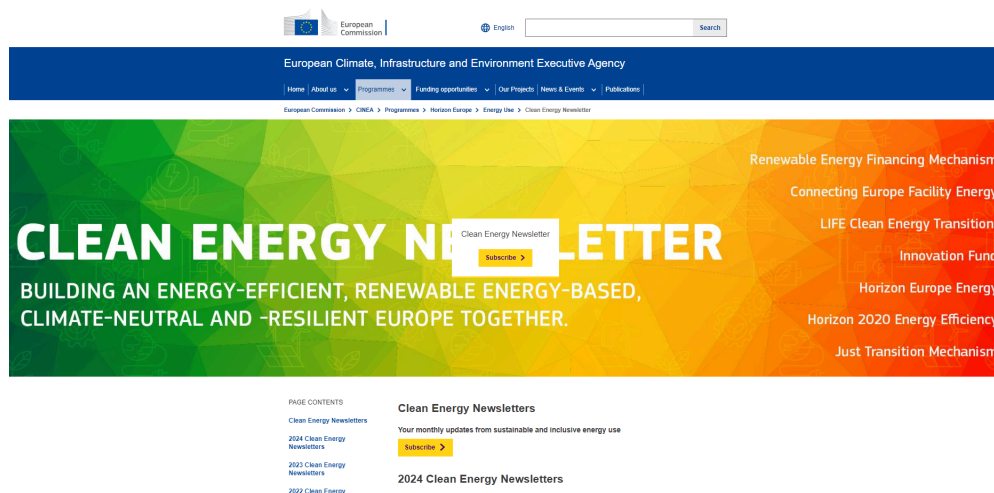


Figure 6: Home page of the Clean Energy Newsletter

- **BUILD UP portal²¹** is one of the most renowned portals for energy efficiency and renewable energy in buildings. News, several types of resources and tools aim to cover all the key topics of interest for professionals and market operators of the construction domain, with an eye to innovation. The SmarterEPC consortium is currently defining a plan of contributions (articles, Expert Talks and other digital inputs) with the team managing the portal and in alignment with other fellow projects, anytime possible. There is already a contribution by Paris Fokaides (EUP) and the release of an Expert Talk dated 24 November 2023²², focused on SRI. Besides, the **BUILD UP Skills** (managed by CINEA) is an additional online place where SmarterEPC can well promote its learning & training packages. It is also present on LinkedIn, X and YouTube.

²⁰ Link:

https://cinea.ec.europa.eu/programmes/horizon-europe/energy-use-horizon-europe/clean-energy-newsletter_en.

²¹ Link: <https://build-up.ec.europa.eu/en/home>.

²² Link to the Expert Talk featuring Prof. Paris Fokaides (EUP) talking about the smartness of buildings: <https://build-up.ec.europa.eu/en/resources-and-tools/audio-visual-resources/expert-talk-paris-fokaides>.

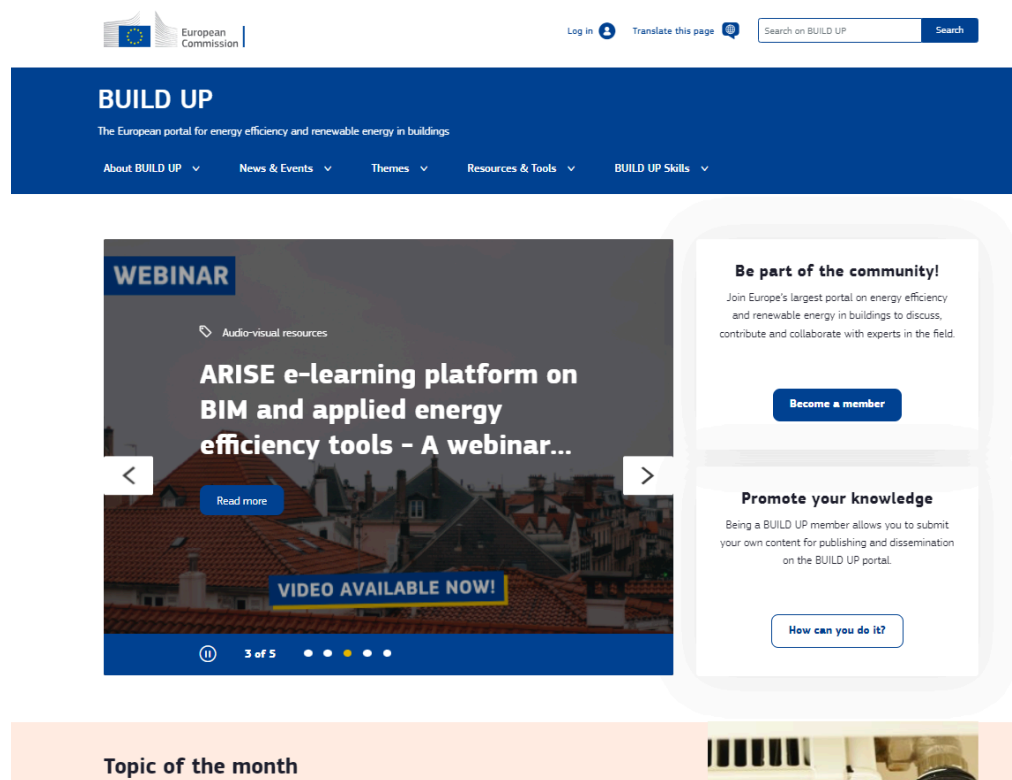


Figure 7: BUILD UP home page

- Construction21 International²³** is a social media and collaborative platform, targeting construction professionals active and passionate about the sustainability of buildings and urban areas. It consists of a worldwide network, made of 12 platforms, cooperating together from different countries. In each country, professionals exchange information in their local language. Born in 2011-2013 thanks to an Intelligent Energy for Europe (IEE) funded project, the consortium of 9 partners aimed to push on the environmental transition of the building market. Closely linked to BUILD UP, it offers information in several formats (news, dossiers, factsheets, videos, etc.) with the scope to offer a forum for fostering meetings and networks. It also hosts an area dedicated to training and, overall, it offers a nice chance to further disseminate SmarterEPC and increase its impact. Some numbers: about 32,900 professionals registered; about 700,000 visitors/year; presence on Facebook, LinkedIn, Instagram and Pinterest.

²³ Link: <https://www.construction21.org/en/index.html>

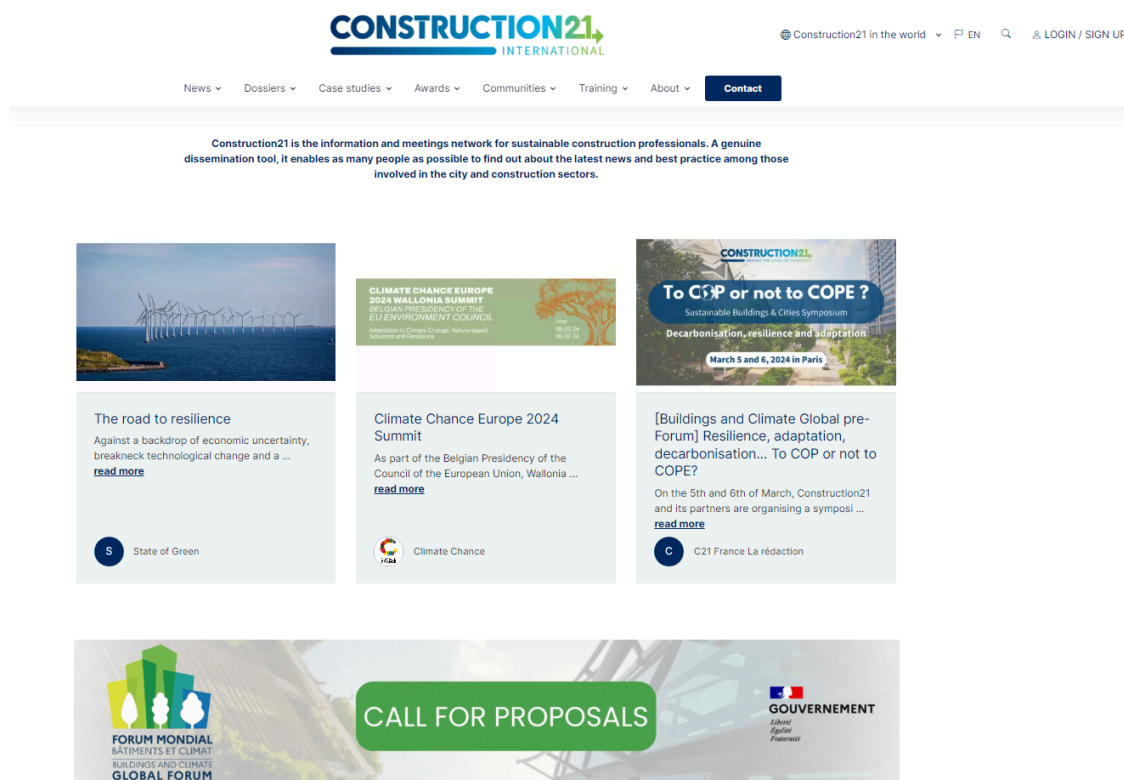


Figure 8: CONSTRUCTION21 International home page

- **LinkedIn Groups linked to energy efficiency and buildings:** on LinkedIn, professionals gathered under specific groups, with restricted access. A selection of them with relevance to SmarterEPC is as follows: EPB Standards Community (#EPBStandards) (restricted group); REHVA Energy Group (restricted group); Level(s): the European framework for sustainable buildings (public group); EU Construction Ecosystem (public group); Standards + Innovation Community (restricted group); IEA EBC TCP (#IEA_EBC) (public group); Sustainable Places Community (public group); European Sustainable Energy Week (public group).
- **REHVA Journal²⁴:** it is a technical, practical journal for the HVAC industry professionals established by REHVA (the Federation of European Heating, Ventilation and Air Conditioning Associations) since 2011. Contributions are licensed under a Creative Commons Attribution-NonCommercial-NoDerivs CC BY-NC-ND. As for the Publication Plan 2024, two issues of the REHVA Journal are of particular interest for SmarterEPC: issue 3 (scheduled for June 2024) is on the Implementation of the EPBD, while issue 5 (October 2024) is about the SRI and Smart Building topic.

²⁴ Link: <https://www.rehva.eu/rehva-journal>.



Figure 9: Cover of The REHVA European HVAC Journal, 06/2023 issue

- **European Energy Innovation²⁵**: it is a free quarterly publication covering Energy, Climate Change and Transport in Europe. The audience consists of about 20,000 people involved in industry, research, academia, EU bodies and National Governments. The Editor is Michael Edmund and is published by Prologue Media Ltd.



Figure 10: Cover of the European Energy Innovation, Summer 2023 issue

²⁵ Link: <https://www.europeanenergyinnovation.eu/> .

2.3.3 Materials of Communication and Dissemination foreseen in SmarterEPC

As foreseen in the SmarterEPC Grant Agreement, but also with some space for new initiatives in line with the evolution of the other legislation pieced at the EU level and/or based on the market trends (in line with the Market Exploitation of EPC and SRI digital tools in a 2030-2040 scenario), several materials are expected to be delivered.

Each type of material is briefly introduced and labelled based on if it serves the consortium for *Internal communication* or *External communication* reasons or both of them, as follows:

- *Internal C&D*: a selection of **templates and tools for the consortium**, as a basis for deliverables and other project reports, presentations; periodic plan and data collection on C&D activities.
- *External C&D*: the **SmarterEPC leaflet**. A first version is needed for partners to be able to start disseminating the project at physical events. Further versions might be foreseen once the project outcomes are ready, as well as on the occasion of specific, relevant events, with a large audience expected, e.g. at conferences, booths at exhibitions, etc.) and an infographic.
- *External C&D*: the **SmarterEPC roll-up**. This is key for brand awareness in large gatherings, like conferences and exhibitions, and for media coverage via photos and videos.
- *Internal and External C&D*: a **periodic e-newsletter** (one every 6 months) and **short news and dissemination articles** will be planned and prepared thanks to the cooperation and contribution of each partner. Interaction with a selection of portals and media channels is foreseen as well by R2MI together with partners having already a connection to such channels, to guarantee media coverage also in Brussels and in each of the 7 countries involved in the project (namely France, Greece, Netherlands, Cyprus, Italy, Finland and Romania).
- *Internal and External C&D*: the **six reports for the Integration of Smarter EPC outcomes into complementary actions**²⁶. Intended as a sort of long factsheets, each one devoted to a specific theme and prepared by one or more partners, according to their expertise.
- *Internal and External C&D*: **several types of videos** are foreseen in SmarterEPC. They might derive from WP2 & other WP workshops, online webinars, and video pills linked to the learning & training packages (EPBC), as well as WP6 promotional videos (introducing the project and/or collecting key results; interviews to partners, etc.) and featured in popular media and platform channels (e.g., like the SmarterEPC YouTube one, the platforms like BUILD UP, etc.)
- *Internal and External C&D*: the **final SmarterEPC report (publishable version)** is foreseen to be prepared by the end of the project (M36), with inputs by all partners and high-quality contents on key results and recommendations by the consortium on several aspects. The process of the report draft will be closed by a review and validation by CINEA before publication, following the high-level standards of the typical EU publications. Another final document to be prepared by the consortium is the **After-LIFE Plan**, which is mandatory for all the LIFE-funded projects.

²⁶ See the Grant Agreement, Annex 1 Part B, Sec. 1.6 Complementarity with other actions, and Task 6.2 Communication & Dissemination Activities & Material (M1-M36) (R2MI).

On **events**, participation and presentation of the project and its results to a selection of external events, at the national level and in Brussels, is one of the best ways to engage with other experts but also the large public. Events span from policy gatherings with fellow projects, to meetings of working groups involved in standardisation topics, to large, technological fairs and exhibitions as well as restricted meetings (NDA), linked to market opportunities with a selected audience. A list of potential external events has been collected by R2MI, thanks to partners' input, since the project Kick-off meeting and is available online on the SmarterEPC Google Share Drive.

For a selection of such materials (the ones foreseen at the project beginning), information is featured on **D6.2 Established internal and external communication channels and materials** (OTH, PU).

2.3.4 Scientific publication and Open Science practices

Research Data Management and Open Science are two domains co-managed between WP1 (Task 1.3 Ethical issue monitoring, EUP, and related D1.6 Data Management Plan & Ethics, M18) and WP6 (Task 6.2 Communication & Dissemination Activities & Material, R2MI).

In connection to WP6, such practices lay the basis for the correct management and delivery of all scientific contributions at the project level, namely articles on (potentially h-index) journals on topics like the building sector, digitization applied to buildings and innovative services, EPC and SRI assessments supported by digital tools, standards, building sustainability and renovation, trends in national/EU real estate sector, etc.

In particular, in SmarterEPC the following principles will be followed:

1. **Early and open sharing of research:** all partners are aware of the need, for the project impact, to guarantee early and open sharing of project results. Anytime is needed, SmarterEPC partners interested in delivering Scientific publications on recognized journals and providing related data and metadata on Open Access repositories (like EUP, CERTH, etc.) will pre-record research strategies and reports on Open Access Repositories (to be selected) ahead of the study's execution, as well as scientific publications once accepted by journals. Besides, pre-printing and crowd-sourcing will be considered as well by those partners. Open Access repositories might be chosen among Zenodo, Figshare, PeerJ, OSF Preprints.
2. **Measures to assure consistency of research outputs and management of research outcomes:** SmarterEPC partners involved in the preparation of scientific contributions will pay attention to three primary research methodological approaches on reproducibility (1. reproduction, 2. replication, and 3. re-use), to guarantee that SmarterEPC results are replicable.
3. **Participation in peer-review and Open Access (OA) to research findings:** All research/scientific findings generated as a result of SmarterEPC deployment are to be compliant with EU Open Access and Open Science guidelines. **Each partner or groups of partners generating results with scientific relevance are responsible for their collection, management and curation** (including datasets and metadata). SmarterEPC scientific articles will be submitted in OA journals, in line with OA principles established by the EC on EU-derived Scientific Publications, as well as on

SHERPA/RoMEO platform, DOAJ, ROAR, OpenDOAR, OpenAIRE, and OAD. The consortium will duly consider all the options offered free-of-charge by the **Open Research Europe platform**.²⁷

4. **Engagement of important knowledge stakeholders in the co-creation of R&I objectives and materials, such as citizens, civil society, and end users:** as for the spirit of LIFE Programme, also in SmarterEPC the consortium is looking to involve possible experts (like non-professional academics, etc.) and non-experts (e.g., representatives of local governing bodies, citizens passionate about EPC and SRI assessments for buildings) throughout the project. As an example, their participation during the validation of SmarterEPC processes and tools in the demonstration sites (under WP4) is key for both feedback collection on layman terms and project awareness and visibility.

2.4 Communication and Dissemination phases

The approach is based on a **4-step methodology**, which is focused on the why, what, to whom and how of the concerted action and it is detailed as follows:

- *Step 1: Why* to communicate & disseminate?
- *Step 2: Whom* (main target groups) to communicate and disseminate to?
- *Step 3: What* to communicate & disseminate?
- *Step 4: How* to communicate & disseminate?

Besides, a further *Step 5* would be **When** to communicate & disseminate, as the temporal factor might be relevant when it comes to valorising specific results and/or marketing and promotion for accompanying policy and/or market exploitation and commercial initiatives.

Following this methodology, activities are organised according to 3-year project duration:

In Year 1 (M1-M12): SmarterEPC starts its activities and sets the basis for further communication and dissemination. Hence:

- The visual identity of the project is designed for project brand and recognition.
- The online presence is launched via a first version of the web page, and social media are set up and running;
- A first kit of communication and promotional materials is conceived (namely leaflet, roll-up, etc.).
- First news on the project's existence, objectives, activities and partners are promoted; first newsletters are issued and promoted online (via the web page, social media) and stakeholders who subscribed to it (by giving Privacy consent, according to the EU and National GDPR).
- Partners start to join first events, which are key to start building the SmarterEPC Ecosystem at stakeholders' level; it might be the case that the consortium organises first own events as workshops, webinars, etc.) that support both promotion of the project and feedback collection for a selection of tasks (e.g., via interviews to experts, polls to citizens, etc.).

²⁷ Link: <https://open-research-europe.ec.europa.eu/>.

In Year 2 (M13-M24) and Year 3 (M25-M26): SmarterEPC communication is consolidated, while dissemination is gradually introduced, depending on the linked strategy on Exploitation of project results.

- Communication materials are updated on a periodic way, to duly incorporate the project progress.
- The web page is updated on a periodic basis and refreshed in terms of featured contents. It features a list of materials accessible to any web user, like:
 - Technical factsheets, dissemination articles, scientific papers, reports, project publications and public deliverables;
 - News and related newsletters, with evidence of the activities performed by the partners, the events and recordings and/or presentations delivered;
 - Links to the SmarterEPC Hub and the Virtual Training Centre (VTC);
 - Embedded social media (LinkedIn and Twitter, as well as a YouTube channel opened for hosting SmarterEPC videos on the project goals, interviews to experts, project demonstration sites, webinars on training, etc.).

The webpage will also follow a number of principles, like: a simple structure to ease the efforts for its maintenance; the communication style has to be as simple and consistent as possible and EU project's jargon should be avoided, to get a wide audience of web-users to understand what is featured and be able to find what is looking for; public deliverables of SmarterEPC project has to be uploaded online and made accessible to all as soon as they are approved by CINEA

2.5 Communication and Dissemination activities linked to KPIs

In line with the draft dissemination plan of the SmarterEPC project²⁸ and as updated at the consortium level after the project kick-off meeting by Task 6.1, the following table collects the activities to be done (split into Years 1, 2 and 3) and gathered according to in order to reach the C&D KPIs through M36:

Table 1: SmarterEPC C&D activities and KPIs on an annual basis

C&D Strategy and KPIs	1-Online presence (Webpage and social media)	2-Communication and Dissemination Materials	3-Stakeholders -driven workshops and events (internal/external)	4-Scientific publications, conferences, fairs
Year 1 M1-OCT23 M12-SEP24	M1-M3: SmarterEPC web page design, and set-up (contents, graphics and EU GDPR).	First version of basic communication templates for the consortium (GDoc, GSlides), project leaflet, roll-up, scientific poster	At least n. 1 workshop/event is organised by partners, in the framework of a relevant event for SmarterEPC domains (building, digitization,	At least n. 1 presentation at the external event is delivered. At least n. 2

²⁸ See Annex 1 Part B, 3.5.2 Draft dissemination plan (to be updated with the launch of the project), Table 13.

	<p>Launch of LinkedIn and Twitter SmarterEPC channels and periodic posts.</p> <p>M4-M12: Consolidation of contents on the web page.</p> <p>Periodic posts on LinkedIn and Twitter SmarterEPC channels.</p> <p>At least n. 1 video presenting the project concept, goals, and consortium.</p>	<p>template and project presentation.</p> <p>Periodic short news on the web page and via posts on social media.</p> <p>Newsletters on a 6-month basis.</p>	<p>EPC & SRI, standards). Synergies with fellow projects are promoted.</p> <p>Attendance of at least n. 2 networking events by SmarterEPC partners.</p>	<p>reports on the Integration of Smarter EPC outcomes into complementary actions are produced by selected partners.</p>
<p>Year 2 M13-OCT24 M24-SEP25</p>	<p>Updates of the SmarterEPC web page with materials openly accessible.</p> <p>Periodic posts on LinkedIn and Twitter SmarterEPC channels.</p> <p>Launch of a YouTube dedicated channel.</p>	<p>Second version of the project leaflet and presentation.</p> <p>Short news on the webpage and via posts on social media.</p> <p>Newsletters on a 6-month basis.</p> <p>First project brochure / infographic.</p>	<p>At least n. 1 workshop/event is organised by partners, in the framework of a relevant event for SmarterEPC domains (building, digitization, EPC & SRI, standards). Synergies with fellow projects are promoted.</p> <p>Attendance of at least n. 2 networking events by SmarterEPC partners.</p>	<p>At least n. 2 scientific papers (in OA) are published.</p> <p>At least n. 2 presentations at the external event are delivered.</p> <p>At least n. 2 reports on the Integration of Smarter EPC outcomes into complementary actions are produced by selected partners.</p>
<p>Year 3 M25-OCT26 M36-SEP27</p>	<p>Updates of the SmarterEPC web page with materials openly accessible.</p> <p>Periodic posts on LinkedIn and Twitter SmarterEPC channels.</p> <p>At least n. 5 national press releases (1 / each country of the</p>	<p>Updated version of the project leaflet and presentation.</p> <p>Short news on the webpage and via posts on social media.</p> <p>Newsletters on a 6-month basis.</p> <p>Updated project brochure / infographic.</p> <p>One final project publication (tentative</p>	<p>At least n. 2 workshops/events are organised by partners, in the framework of a relevant event for SmarterEPC domains (building, digitization, EPC & SRI, standards). Synergies with fellow projects are promoted.</p> <p>Attendance of at least n. 2 networking events by SmarterEPC partners.</p>	<p>At least n. 2 scientific papers (in OA) are published.</p> <p>At least n. 1 presentation at the external event is delivered.</p> <p>At least n. 2 reports on the Integration of Smarter EPC outcomes into</p>



	<p>project) are launched, based on impacts of the use of the SmarterEPC Hub by auditors on the demonstration sites and the Learning and Training packages.</p>	<p>title “Report for the Integration of SmarterEPC outcomes into complementary actions”) prepared by the consortium and validated by CINEA.</p> <p><i>Mandatory for all LIFE projects: Laymans’ Report + After-LIFE Plan.</i></p>		<p>complementary actions are produced by selected partners.</p>
<p>Overall, at least 6.000 people are reached out by the SmarterEPC consortium by M36.</p>				

More details on the specific timing of each initiative, together with the selection of relevant journals and magazines for SmarterEPC scientific and dissemination contributions and the consolidated list of events under SmarterEPC radar are provided within the **Periodic Plan of SmarterEPC C&D activities** (see par. 4.2 Monitoring and Evaluation).



3 Management structure, Monitoring and Evaluation procedure

To guarantee efficient and effective management of what is foreseen in this C&D strategy, the consortium has defined a Management structure, where an Operational team guides partners (a selection of them or all) and the related procedure for decision-making and delivery of the expected C&D activity.

3.1 Management structure: Operational team and involvement of partners

Since C&D activities are called to accompany the life of a project on a continuous basis, in SmarterEPC it has been decided to count on a flexible management structure, able to decide quickly while also guaranteeing that what is set out in the **Grant Agreement (art. 16 - Intellectual Property Rights (IPR) - background and Results - Access Rights and Rights of Use, art. 17 and ANNEX 5 - Specific rules)**, recalled in previous paragraphs and mainly regarding the Exploitation of project outcomes, is followed. Linked to those articles, in the SmarterEPC project²⁹ there is a clear reference to “Results capable of industrial or commercial application must be protected considering legitimate interests. Prior notice of dissemination must be given [...]”. Based on that, an **Operational team** has been set up, consisting of:

- **R2MF:** with the role of Project Coordinator, R2MF is responsible for guiding the consortium, and being sure that the consortium as a whole delivers what foreseen in the Grant Agreement, both according to the EC rules (on a legal and financial side) and the project objectives and expected outcomes (at excellence and impacts levels). For the C&D activities, R2MF is involved with powers of strategic direction and initiative towards the whole consortium and/or specific partners, according to their role, expertise, geographical location, etc.
- **R2MI:** being the WP6 leader (Sustainability, replication, and exploitation of project results), R2MI is the partner responsible for a number of tasks like proposing periodic plan of activities to partners, coordinating the consortium on what is needed to be done at C&D level to maximise the expect impacts while reaching the C&D KPIs, supporting partners and facilitating connections with media and platforms. This role includes proposing a methodology for periodically monitoring and evaluation of what performed during the project. R2MI also has the role of Exploitation Manager in the project, directly linked to the Sustainability, Replication and Exploitation tasks.
- **Each WP leader, depending on the project task involved in the C&D decision:** those partners (EPBC, CERTH, DEMO, besides R2MF and R2MI, mentioned before) have

²⁹ See Annex 1, Part B, 2.4.2 Intellectual Property and Knowledge Management and Protection.

first-hand information on the state of the art of the activities in each WP, and are aware of the outcomes that might be duly disseminated or labelled as confidential because of reasonable exploitation interests. Hence, they are well positioned to inform R2MI and R2MF on which actions are strategic to implement for supporting the promotion of a given result and reaching out to a specific target group (e.g., to gather information via online forms; to get feedback on how the SmarterEPC Hub performs, etc.). At the same time, they are key experts of the project, with know-how and reputation either at academic or industrial level, in different domains (e.g., EPC, SRI and their integration, sustainability in buildings, R&D, policy, regulations, standards, market needs and contacts with the real estate sector) and geographic locations in Europe. This is a precious advantage for deciding the right time to promote or disseminate or being present at given working groups and/restricted meetings at national and/or European level. Besides, in this group it is worthy to include the Scientific & Technical Manager (STM) of SmarterEPC, Prof. Paris Fokaides (EUP).

Furthermore, the identified **procedure for decision-making and delivery of the C&D initiatives** can be either **fast** or **more complex**, depending on the type of activity and the link to strategic and legitimate interests by one or more partners towards results having a market Exploitation value. The two options are detailed as follows:

- **Fast lane:** If actions are to be decided in a fast and efficient way, and no risks are foreseen at the consortium level on the dissemination of sensitive contents (potentially interesting from market and commercial exploitation), R2MI (with R2MF) and the specific partner get aligned via email and an online datapoint if needed and proceed with the communication or dissemination activity. *Expected timing: between 1 month and a couple of days in advance.*
- **Safe procedure:** If the C&D initiative involves more complex decisions at the logistics level (like the organisation of a half or full-day SmarterEPC event, etc.) and content wise (as the publication of a scientific peer-review article in an Open Access journal, preparation of the final project publication with inputs from all partners, plus graphics and editing, etc.), this means starting the action beforehand (indicatively several months before the due date) and having R2MI (with R2MF) and all needed partners informed about it. This is not only due to the time and organisational efforts to perform it but mostly for being aligned with the **Grant Agreement (art. 16 and 17 and ANNEX 5 - Specific rules)**. *Expected timing: 4 months - 1 month in advance.*

3.2 Monitoring and Evaluation

The rationale for having a dedicated Monitoring and Evaluation procedure for the C&D of SmarterEPC is that a good evaluation is critical to **ensure the quality and effectiveness of communication measures** deployed under a LIFE project. Besides, there is a number of advantages at the management level:

- It is key for **R2MI as WP6 Leader**, to monitor how the activities are going on, the performance and identify strengths but also eventual weaknesses and recalibrate the approach set at consortium level to make it more impactful;
- It is strategic for **R2MF in the role of project coordinator** to keep abreast of SmarterEPC state of the art, as part of quality management processes (as foreseen in WP1) and overall management of risks and mitigation. Besides, periodic monitoring facilitates data collection about C&D KPIs that need to be featured in the periodic reporting to the Grant Authority (EC, CINEA).

For these reasons, the process defined for SmarterEPC lies in the framework of the principles and rules set at the consortium level within WP1, under the Qualitative Management of the project. In addition, a **three-step procedure** has been introduced, as follows:

- 1. Periodic Plan of SmarterEPC C&D activities:** this plan (in the form of a shared file) is proposed by R2MI, co-defined with R2MF and the WP leaders and shared at the consortium level. It covers an outlook of 4-6 months so that all partners have a clear idea what is required to do in advance, as well as it is possible to think strategically in advance. This includes promotional materials, a list of events of interest, short and long inputs such as news, technical factsheets, dissemination articles and scientific papers, as well as other ad-hoc materials. Changes are welcome, anytime they are done for the benefit of the project goals.
- 2. Periodic data points online:** during the project monthly meetings, set by R2MF at the consortium level, each WPL has the opportunity to debrief on the ongoing work, anticipate to all partners the upcoming steps and most importantly the need for synergies and alignment among partners. In this case, also R2MI can report on C&D activities, ask partners for specific contributions and co-define the following activities in a strategic way with partners and project needs and opportunities.
- 3. SmarterEPC C&D Tracker:** it is an **online spreadsheet** with a number of tabs, covering both common information for all partners to be aware of, as well as tables to be periodically fill in by all partners and related to a number of physical and online activities aiming to increase the project promotion, dissemination and awareness among stakeholders.



N.	List of potential event/ conference/ fair/ WS linked to SmarterEPC topics	Proponent / Lead Partner	Date	Place (Physical, Online, Hybrid?)	Keywords	Registration - open/ deadline	Call for contributions - deadline	Website	Remarks
1	PropTech Day 2023	CRIF	29 nov 2023	In person - Milan, IT - Circolo Filologico Milanese	Education, Training and Work in the Fintech, Insurtech and Proptech fields	Open - https://www.eventbrite.com/e/biglietti-proptech-day-2023-744122740147?aff=odistributore	NA	https://www.italianproptechnetwork.com/proptech-day-2023/	too early for the project to be disseminated?
2	RE Italy Winter Forum 2024 - Hospitality 2024	CRIF	25 gen 2024	In person - Milan, IT - Borsa Italiana	everything Real estate	Open - https://www.monitorimmobiliare.it/reitaly/accr	NA	https://www.monitorimmobiliare.it/reitaly/	
3	World Sustainable Energy days 2024	EUP?	5-8 Mar 2024	Wels, AT	everything renewable energy		Call for papers closed	https://www.wsed.at/young-energy-researchers	
4	MIPIM - The Global Urban Festival 2024	R2MF - CRIF - R2MI	12-15 Mar 2024	In person - Cannes, FR - Palais des Festivals	everything Real estate			https://www.mipim.com/	
5	RdV de l'Aménagement Durable 2024	R2MF	3-4 Apr 2024	In person - Paris, FR - Paris Expo	TRANSITION ÉCOLOGIQUE DE LA CONSTRUCTION ET DES TERRITOIRES		Not foreseen	https://bac-carbone.com/?utm_source=newsletter&utm_medium=email&utm_campaign=email_news	
6	International Passive House Conference 2024	EUP	5-6 Apr 2024	In person - Inns-bruck, AT - "Tech-nik" cam-pus, Leopold Franzens	"Ret-ro-fit. Have an im-pact!"		Call for papers closed	https://passivhaustagung.de/en/	
7	New European Bauhaus Festival 2024		18-20 Apr 2024	Better in person - Brussels, BE				https://new-european-bauhaus.europa.eu/get-involved/events/festival-new-european-bauhaus/	
8	REbuild Italia 2024	CRIF - R2MI	14-15 May 2024	In person - Riva del Garda TN, IT - Riva del Garda	Innovation in construction (decarb, process efficiency, off-		NA	https://rebuilditalia.it/en	

Figure 11: Example of the SmarterEPC C&D Tracker (List of events tab)



Conclusions

This deliverable presents the first Communication and Dissemination Plan of the SmarterEPC project, providing guidelines and a consistent framework for all planned activities to disseminate and sustain the concepts and achievements developed within the project. The consortium considers it as a living document able to sharpen the Communication and Dissemination activities at the consortium level while being a reference for all partners during the project lifetime.

It is paired with D6.2 (Established internal and external communication channels and materials, OTH, PU), developed in parallel.

The follow-up of this D6.1 with pragmatic plans and KPIs about the activities done and new ones to do is indicatively scheduled as follows:

- M15 (December 2024)
- M27 (December 2025)
- Final version in M36 (September 2026).

