# D5.1 - REPLICATION AND NETWORKING PLAN

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# Executive Summary

The Replication and Networking Plan is designed to describe the replication activities and specify actions and provide a framework for them. The document can be clustered into two sections, the comprising chapters and the main focus, the specification of all replication activities.

Within the comprising chapters, the project itself and the project partners are put into perspective of replication activities. The strategic framework and the engagement strategy is highlighted and the impact including monitoring and evaluation methods is pointed out.

The specification of the replication activities covers a description for each activity on the purpose, the audience, the format and timeline. It complementary provides an overview of included partners and responsibilities as well as expected impact / results and corresponding deliverables. The ePLANET project aims to perform in total 65 engagement activities including communication, dissemination, capacity building, scaling up and replication actions, which can be categorized in four sections:

- **ePLANET capacity building & local campaigns**
  - 12 user empowerment private webinars to build up skills on ePLANET platform
  - 6 user empowerment public webinars to build capacities on Energy Transition
  - 6 user empowerment workshops to build up capacities on Energy Transition
- **Scale-up activities**
  - 6 scale up public webinars to showcase the platform and for peer mentoring between public authorities to build up capacity on national level
  - 3 scale up private workshops to build capacities on Energy Transition.
  - 6 public conferences participations in pilot countries (2 per pilot country) to facilitate the replication
- **EU wide replication**
  - 1 Open call to identify and select up to 6 follower regions
  - 12 Stakeholder forums to receive guidance on ePLANET development.
  - 2 public conferences participations to facilitate the replication
  - 1 final event to disseminate results and facilitate replication
- **Joint exchange activities for follower regions**
  - 3 study visits from follower regions to pilot regions as bilateral learning event
  - 6 technical support visits to each follower region to support implementation
  - Continuous remote support for follower regions

The timing of all the activities is shown in the overview below.

*Table 0-1 Overview and timeline of ePLANET activities*

| EPLANET ACTIVITIES | | QUARTER 1 (SEP-NOV) | QUARTER 2 (DEC-FEB) | QUARTER 3 (MAR-MAY) | QUARTER 4 (JUN-AUG) |
|---|---|---|---|---|---|
| **Project year 1** | **Local** | | | | |
| | **Scale-up** | | | | |
| | **EU wide** | | 1 Stakeholder Forum | 1 (+1) Stakeholder Forum<br>1 Open Call | 1 Stakeholder Forum |
| | **Follower regions** | | | | Selection of follower regions |
| **Project year 2** | **Local** | | 3 User empowerment private webinars | 3 User empowerment private workshops<br>3 User empowerment public webinars | 3 User empowerment private webinars |
| | **Scale-up** | | | | |
| | **EU wide** | 1 Stakeholder Forum | 1 Stakeholder Forum | 1 Stakeholder Forum | 1 Stakeholder Forum |
| | **Follower regions** | Remote support + study visits + technical support visits | | | |
| **Project year 3** | **Local** | 3 User empowerment private workshops<br>3 User empowerment public webinars | 3 User empowerment private webinars | 3 User empowerment private webinars | |
| | **Scale-up** | | 3 public webinars | 3 private workshops | 3 public webinars |
| | **EU wide** | 1 Stakeholder Forum | 1 Stakeholder Forum | 1 Stakeholder Forum<br>1 Final event | 1 Stakeholder Forum |
| | **Follower regions** | Remote support + study visits + technical support visits | | | |

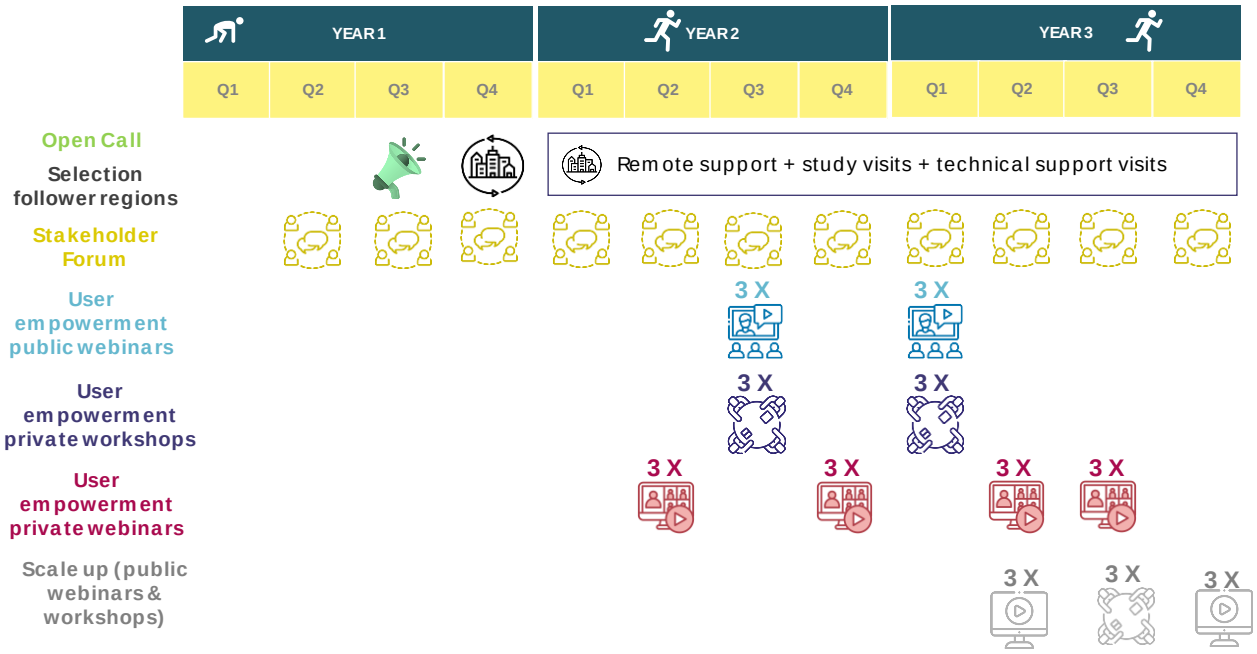


*Figure 0-1: visual calendar of ePLANET activities*

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# Abbreviations and Acronyms

| ABBREVIATION OR ACRONYM | DESCRIPTION |
|---|---|
| CoM | Covenant of Mayors |
| EC | European Commission |
| EI | Expected Impact |
| ESCO | Energy Services Companies |
| ET | Energy Transition |
| ETM | Energy Transition Measures |
| EU | European Union |
| H2020 | Horizon 2020 |
| KPI | Key Performance Indicators |
| MoA | Memorandum of Adhesion |
| PA | Public Authority |
| RES | Renewable Energy Sources |
| SEAP | Sustainable Energy Action Plan |
| SECAP | Sustainable Energy and Climate Action Plan |
| SO | Specific objective |
| SUMP | Sustainable Urban Mobility Plan |
| TG | Target Groups |
| WP | Work Package |

# 1 Introduction

The ePLANET Replication and Networking Plan is designed to support the capacity building activities and the integration of the achievements in other European regions within the project. It represents deliverable (D5.1) within Work Package 5 ("Replication and Networking") of the ePLANET project.

ePLANET is an H2020 funded project which focuses on the need to facilitate and ease the adoption of coordinated Energy Transition (ET) actions by European public authorities (Municipalities and Regions). To do so, a new framework to share information in a harmonized common language is set, and a "clustering governance" strategy based on a digital platform is deployed. ePLANET aims to define a harmonized set of energy transition measures (ETM), policies and data structures, with the objective of avoiding duplicated and ambiguous definitions in local, regional and national plans. The work builds on the analysis of existing plans and previous harmonization efforts, establishing a clear reference and connection to the EU Taxonomy Regulation. A Common Data Model is created, that allows the comparison and alignment of energy sustainability planning across different governance levels.

The ePLANET digital infrastructure is built based on the existing big data analytics architecture of CIMNE (developed within the European Union (EU) funded projects SHERPA & EDI-Net), and is adapted on the base of the established Common Data Model to enable the digital representation of ET plans. The developed infrastructure allows automated data gathering, processing, monitoring and sharing across different governance levels. Data harmonization being one of the main goals, the information contained in the platform can be exported in formats compatible with public authorities Sustainable Energy and Climate Action Plans (SECAPs) and Sustainable Urban Mobility Plans (SUMPs), thus helping the analysis of all available information and reducing the required efforts from the public authorities. Through the ePLANET platform, public authorities are provided with a set of tools to improve decision-making and policy-making, facilitating the process of adoption, implementation, and monitoring of new or improved policies and action plans.

## 1.1 Project Objectives

The overall objective of the ePLANET project is the development and implementation of a methodology to improve the multi-level governance of public authorities regarding the implementation of energy transition strategies and coordinate the adoption of ETMs to achieve the European sustainability targets.

Under the framework of a common information-sharing platform, all local and regional authorities involved in the project will be able to introduce the ETM, strategies and actions implemented or planned in their region. Thanks to the use of this platform, and by means of the ePLANET capacity building and networking activities, public authorities are given the possibility to analyse and benchmark energy transition plans, identify potential synergies with other public authorities, and establish dialogue and cooperation in effective governance groups.

The ePLANET project is expected to trigger more than 177 GWh annual energy savings, 12 GWh annual renewable energy production, promote more than 600 institutionalized collaborations and increase capacities for more than 900 public authorities.

To reach the main goals of the project as described above, five specific objectives (SO) have been defined and key performance indicators (KPI) allocated:

*Table 1-1 Specific objectives of ePLANET*

| SO | DESCRIPTION | KPI | WP |
|---|---|---|---|
| SO1 | To set a transparent information sharing framework among public authorities. | 1 harmonized set of energy transition measures<br>1 common data model | WP2, WP3 |
| SO2 | To deploy multi-level working groups of public authorities and stakeholders for sharing information and enabling a collaborative approach in development and updating of Energy Transition plans. | 764 stakeholders engaged in the ePLANET governance clusters | WP5 |
| SO3 | To enable digitalization of the energy transition plans of the public authorities as base for coherence, sharing, coordination and integration. | 904 public officers trained<br>603 energy transition plans introduced to ePLANET | WP3, WP4, WP5 |
| SO4 | To support new adopters and consolidate existing networks. | 100 ePLANET facilitators trained and engaged<br>150 members in the Stakeholders' Forum | WP2, WP5 |
| SO5 | To institutionalize ePLANET networks and multi-level working groups. | 603 Memorandum of Adhesion (MoA) signed<br>32 policies influenced | WP5, WP6 |

The particular objective of Work Package 5 (WP5) of the project is to widen the impact of the ePLANET project, following a 3-tier approach, through:

- establishing a continuous engagement strategy for early adopters and most engaged stakeholders.
- scaling up the project to the whole region territories of the pilot sites, engaging with all the local authorities in the territory.
- engaging with a number of additional regions that are not part of the ePLANET partnership, utilising the skills of the partnership to support those additional regions in sustainable energy action plans' challenges.

The **3-tier engagement approach** will be followed for the scale-up and replication activities of WP5, is based on establishing 3 different levels of involvement and responsibilities of engaging the public sector within the pilot regions and beyond, and deploying specific tailored-made measures for each of them:

- Level 1 – Interested stakeholders
- Level 2 – Platform Adopters and Engaged stakeholders
- Level 3 – Early Adopters and Actively Engaged stakeholders

## 1.2 Project Partners

The project consortium includes public authorities, associations, a Research and Development centre and a SME, covering the different fields of experience required for a successful project implementation. In particular, expertise in the public sector, energy transition strategies (SEAP/SECAP, ETM, energy efficiency services, RES technologies, urban planning), capacity building, networking and communication is covered. Three regional public authorities are also included in the consortium, having the role of institutionalizing the project outcomes and promoting the adoption within a large number of local authorities. The involved partners are:

- **CIMNE** (International Centre for Numerical Methods in Engineering) is a leading research and technological development institution, with proven ability to implement and maintain data management services for public authorities, and significant experience in coordinating collaborative projects. CIMNE takes on the coordination of the project and leads the digital and technical developments.
- The regional authorities involved are **DDGI** (Provincial Council of Girona) for the Girona pilot site, **RDFC** (Regional Development Fund of Crete) for the Crete pilot site, and **EAZK** (Energy Agency of the Zlín Region) for the Zlín region pilot site. In order to ensure complementarity with other relevant initiatives, these partners are also CoM territorial coordinators. RDFC is also representative of the Clean Energy for EU Islands initiative and RDFC and EAZK are members of the ManagEnergy network. The regional authorities have the responsibility of being in contact with the local authorities, while leading and optimizing the adoption of project outcomes to the whole region.
- National authorities are also included in the consortium, for the Girona and Crete pilots. **ICAEN** (CoM supporter) is the National Catalan Energy Agency. Given the political framework in Spain, ICAEN works on different levels of authority, depending on the scope of the activity. It is responsible for the energy planning in four provinces of the region of Catalonia, including the Girona province. ICAEN is also a member of the ManagEnergy network. **CRES** (Centre for Renewable Energy Sources and Saving, CoM national coordinator) is the National Greek authority acting as a national coordinating centre in the fields of energy efficiency and the promotion of renewable energy sources. ICAEN and CRES have the role of facilitating the adoption of ePLANET outcomes within the national territories, supporting other interested regional and local authorities in the process.
- The ePLANET consortium also includes two relevant EU-wide associations: **FEDARENE** (European Federation of Agencies and Regions for Energy and Environment) and **ICLEI EURO** (ICLEI - Local Governments for Sustainability / ICLEI European Secretariat). These two organisations have the responsibility of ensuring the replication of the project outcomes to other territories (regions, cities) and of promoting clustering governance networks between public authorities at European level.
- Finally, **LIMA** (Low Impact Mediterranean Architecture) is managing the communication and dissemination strategies of the project, while **THREEOCLOCK** leads the tasks on user-centred design of training materials, ensuring effective capacity building and providing the necessary training tools. These organizations are also providing complementary support on energy transition strategies, services and technologies, being this part of their core expertise.

## 1.3 Work package 5 tasks and deliverables

The activities of WP5 of the ePLANET project are structured around four Tasks, summarised as follows. The detailed actions foreseen within each Task are analysed in Chapter 5 of this report.

- Task 5.1: Continuous engagement and feedback
- Task 5.2: Scale-up at national level and within pilot regions
- Task 5.3: Scale-up workshops
- Task 5.4: Evaluation of the joint exchange activities

A list of the deliverables associated with WP5 is provided in the following table. The deliverables are mainly related with the replication and networking activities, which will be performed in the framework of WP5.

*Table 1-2 Overview WP 5 Deliverables*

| DELIVERABLE NUMBER | DELIVERABLE TITLE | LEAD BENEFICIARY | TYPE | DISSEMINATION LEVEL | DUE DATE |
|---|---|---|---|---|---|
| D5.1 | Replication and networking plan | FEDARENE | Report | Public | 5 |
| D5.2 | Stakeholders' forum engagement reports | FEDARENE | Report | Public | 36 |
| D5.3 | National Webinars' recordings and reports (x6) | FEDARENE | Websites, patents filing, etc. | Public | 28 |
| D5.4 | CoM ePLANET workshop reports (x3) | FEDARENE | Websites, patents filing, etc. | Public | 35 |
| D5.5 | EU Open Call | FEDARENE | Websites, patents filing, etc. | Public | 7 |
| D5.6 | Evaluation report with assessment criteria matrix | FEDARENE | Report | Public | 12 |
| D5.7 | Follower Regions Evaluation Questionnaire | FEDARENE | Websites, patents filing, etc. | Public | 20 |
| D5.8 | Reports on join exchange activities experiences | FEDARENE | Report | Public | 32 |

The launch of the EU-wide open call for follower regions (EU Open Call in M7) and the engagement of follower regions through signature of Memorandums of Adhesion (MoA) (Follower regions are engaged in M20) are considered the two key milestones of WP 5.

## 1.4 Link with other work packages and tasks

WP 5 builds on the outcomes of other WPs of the project, e.g., WP2 (Governance), WP3 (Digital Governance) and WP4 (User Empowerment), as its aim is to maximise the adoption of the ePLANET solutions developed in those WPs, to a wider audience (wider regional, national and EU level). In parallel, it also links with the horizontal activities carried out throughout the project on WP6 (Sustainability beyond project duration) and WP7 (Communication and Dissemination).

More specifically, this deliverable is directly linked with two other tasks of the project: Task 2.1 and Task 4.1:

**Task 2.1** - **User centred requirements** (ICAEN, CIMNE, CRES, ICLEI EURO, DDGI) [M1-M6]

This task has the main objectives of identifying the requirements and necessities of local authorities when it comes to planning, implementing, and monitoring energy transition plans. The user centred approach is necessary to understand the real needs of ePLANET users, ensuring the future adoption of ePLANET outcomes by public authorities at different governance levels. Under this task, the partners are gathering information from public authorities and key stakeholders (including the insights gained from the Stakeholders' Forum), to identify which are the main needs, barriers, and pains to establish effective vertical and horizontal coordination at local, regional and national level. This process of information gathering is based on discussions, interviews, surveys, and workshops.

**Task 4.1** - **User-centred design of training material** (3OC, CIMNE, CRES, DDGI, ICLEI EURO, FEDARENE) [M3-M10]

The objective of Task 4.1 is to identify the main requirements and needs of the different target groups, to facilitate the creation of capacity building materials adapted to their specific needs. Within this task, different target users, at local level and regional and national level are identified and characterised. Desktop research is also performed, to gain understanding of the main needs, barriers and pain points for the identified users. Open discussions and interviews with the different typologies of users are carried out in close collaboration with Task 2.1. Discussions with experts from the Stakeholders' Forum are also to be engaged, with the goal of providing direct insights from the market regarding key necessities and barriers for the widespread adoption of the project outcomes.

# 2 Replication and Networking Strategy Framework

The Replication and Networking Strategy builds on the three-tier approach of ePLANET and includes all four defined target groups. Tailored communication and activities for the different target groups and level of involvement as well as incorporating local circumstances will maximise the impact of ePLANET. The Replication and Networking Plan describes the specific work plan for the replication activities and involvement of stakeholders.

## 2.1 Three-Tier Approach

As detailed in the Communication and Dissemination Plan (deliverable D7.1 of the project), the three-tier approach follows a methodology used to increase the efficiency of engagement strategies in collaborative scenarios. The level of engagement and involvement of people and entities on a specific subject or activity depends largely on their own motivations. Dividing a group into different subgroups depending on their degree of motivation will allow the rationalisation of resources and the deployment of tailor-made activities depending on the target degree of motivation: most engaged tier will be involved in more requesting activities, and less engaged tier will have lighter involvement in activities.

*Figure 2-1 Three-tier approach principle*

The three-tier approach will be applied in the different ePLANET engagement activities, including the Replication and Networking Plan, by creating 3 different groups with progressive engagement levels. First tier for the less motivated. Third tier for the most motivated.

Public authorities and stakeholders will have the possibility to participate in any of the groups, depending on their own motivations and the responsibilities they can assume. This engagement approach will maximise the further adoption of ePLANET tools by public authorities.

The national and EU-wide replication and networking strategy will focus on the 2nd and 1st levels of the three-tier approach in ePLANET project. Those groups will be open to the whole public sector, with the objective to shift them on to upper level of engagement. The 3rd level of engagement of the three-tier approach will be mainly reserved to the stakeholders and public

authorities participating in the ePLANET Stakeholder Forum. Its members will be the first adopters of ePLANET tools and methodologies, as well as key stakeholders bringing similar successful experiences regarding ePLANET outcomes.

*Table 2-1: Activities and responsibilities following the three-tier approach*

| | | LEVEL 1 | LEVEL 2 | LEVEL 3 |
|---|---|---|---|---|
| ACTIVITIES | Newsletter | Yes | Yes | Yes |
| | Public webinars | Yes | Yes | Yes |
| | Private webinars | -- | Yes | Yes |
| | Workshops | -- | Yes | Yes |
| | Site-visits | -- | Yes | Yes |
| | Stakeholders Forum | -- | -- | Yes |
| RESPONSIBILITIES | Memorandum of Adhesion | -- | Yes | Yes |
| | Use and feedback of ePLANET platform | -- | Yes | Yes |
| | Designation of ePLANET facilitator | -- | Yes | Yes |
| | Participation in working groups | -- | -- | Yes |
| | Participation in Stakeholders Forum's meetings | -- | -- | Yes |

## 2.2 Target Audience Segmentation

The Target Audience of ePLANET project is grouped into 4 main target groups (TG), as defined in the Communication and Dissemination Plan:

- TG1: local, regional and national authorities, initiatives for PA
- TG2: sustainability experts, urban planners, ESCOs & investors in sustainability
- TG3: scientific community and related EU projects
- TG4: general public

The Replication and Networking Strategy will be mainly focused to TG1, which is considered critical to foster the initial adoption of ePLANET outcomes. Despite this special emphasis on TG1, some of the planned activities will also be tailored to TG2 (supporting TG1 into the

definition of SECAPs and ETM) and TG3 (maximizing synergies with similar initiatives and research activities).

### 2.2.1 Supporters of the project

The consortium includes the main public authorities within the pilot regions, ensuring a broad support from the local authorities within these regions. Moreover, some specific public authorities have already signed a letter of interest showing their willingness to support the project. For example:

- Zlín region: 46 municipalities and 2 microregion authorities,
- Crete region: 5 municipalities and 1 supra-local authority,
- Girona region: 3 municipalities and 3 supra-local authorities representing 113 municipalities.

The project has also relevant support from outside the pilot regions. A part from the institutional connections from regional authorities in the consortium, 9 municipalities and 3 regional authorities from Catalonia, together with 1 municipality and 2 regional authorities from Greece have also signed respective letters of support.

## 2.3 Dissemination

The Communication and Dissemination Plan defines several tools and actions to increase the visibility of the project and to foster dissemination of project results. The replication and networking activities will be intrinsically linked to the dissemination and communication actions.

Following that principle, the different channels to communicate news and project progress (website, social media, press release) will be also used to increase the visibility of the replication and networking activities (e.g., stakeholders forum, open call for replication, etc.).

# 3 Activities

## 3.1 ePLANET capacity building & local campaigns

ePLANET will deliver tailored capacity-building activities for public authorities in the three pilot sites to step up their capacity to drive the sustainable energy transition in their respective territories. The scope, content and specific format of these activities will emerge from the analysis of WP2, WP3 and specially WP4. In particular, the first task of WP4 will help us develop capacity-building activities for different type of actors in the region that are tailored to their needs and empower them to develop and implement their energy transition plans and measures, despite the increasing administrative and financial constraints that they face.

In total, the capacity-building programme will consist of:

- 12 user empowerment private webinars to build capacities on ePLANET platform.
- 6 user empowerment public webinars to build capacities on ET.
- 6 user empowerment private workshops with experts to build capacities on ET.

These webinars and workshops will reach a large number of public authorities and public officers. All these public officers and authorities will have access to the ePLANET platform (WP3) and to all the training and capacity building material that will be generated in the project (WP4). It is estimated that within the project duration ePLANET will improve the capacity and skills in delivering ET to 904 public officers and public authorities.

Moreover, during the scaling up face, these capacity-building activities will be delivered to a national/regional audience as well as 6 follower regions (2 per pilot site) on EU level, maximising the impact of the project.

There are three deliverables related to these activities:

- D4.1 – Main user requirements and needs for training material (M10, 3OC)
- D4.2 – Strategies to tackle prioritised ET barriers (M16, 3OC)
- D4.3 – Report on training materials (M29, 3OC)

### 3.1.1 User empowerment private webinars

#### *3.1.1.1 Purpose and Scope*

The aim of the user empowerment private webinars is building up skills related to the ePLANET tools and platform as well as pushing relevant stakeholders from Level 1 to Level 2 (or even 3) of the three-tier approach. The scope and content of these webinars may depend on the specificities of each pilot and will be defined on the basis of the analysis carried out in Task 2.1, Task 4.1 and WP3. They can cover topics like how to use the platform, how to convert energy transition measures into harmonized measures, how to import data, roles and obligations of ePLANET facilitators, etc.

There are altogether 12 private webinars foreseen (4 per pilot site). The partners from the pilot regions will translate and adjust training materials accordingly.

#### 3.1.1.2 *Expected / targeted Audience*

The user empowerment private webinars target partners from the ePLANET consortium and key stakeholders from level 3 (early Adopters and Actively Engaged Stakeholders) of each pilot.

#### 3.1.1.3 *Format of the activity*

The user empowerment private webinars will be a series of around 12 online meetings (4 per pilot site) held via GoTO platform (or a similar online tool). As mentioned before, the content of each webinar will emerge from the analysis of WP2, WP3 and WP4 and the format still needs to be defined (format preferences will be collected in Task 4.1). Finally, user empowerment private webinars will be held in local languages to encourage participation of key local stakeholders. Adequate time for discussion will be provided. The activities will be recorded and made available online and disseminated among level 3 stakeholders via ePLANET and partners communication channels.

#### 3.1.1.4 *Timeline*

The user empowerment private webinars will take place from February 2023 (M18) until August 2024 (M36). The discussion on the content for the webinars shall be started in M11 (July 2022).

*Table 3-1 User empowerment private webinars - timeline*

| # USER-EMPOWERMENT PRIVATE WEBINARS | QUARTER 1 (SEP-NOV) | QUARTER 2 (DEC-FEB) | QUARTER 3 (MAR-MAY) | QUARTER 4 (JUN-AUG) |
|---|---|---|---|---|
| Project year 1 | | | | Start Content discussion |
| Project year 2 | | 3 | | 3 |
| Project year 3 | | 3 | 3 | |

#### 3.1.1.5 *Involved Project Partners including their responsibilities*

*Table 3-2 User empowerment private webinars - Partner responsibilities*

| USER-EMPOWERMENT PRIVATE WEBINARS (L=LEAD, X=CONTRIBUTE) | CIMNE | ICAEN | CRES | FEDARENE | ICLEI | DDGI | RDFC | EAZK | LIMA | 3OC |
|---|---|---|---|---|---|---|---|---|---|---|
| Deciding on content | X | | X | X | X | X | X | X | X | L |
| Preparing training materials for webinars | X | | X | | | X | X | X | X | L |
| Holding webinars | | | X | | | X | X | X | | L |
| Documentation and feedback | X | | X | X | | X | X | X | | L |
| Follow up on the workshops | X | | X | | | X | X | X | | L |

#### 3.1.1.6 *Expected impact, results and corresponding deliverable*

In total the webinars shall support the expected 960 attendees (average of 80 per webinar) to build up capacity and raise awareness of the ePLANET governance tools and the ePLANET platform and its benefits as well as to attract them to become closer followers of the project (from level 1 towards level 3) and support the implement within and beyond the project focus area. These webinars support the continuous engagement actions of the ePLANET project.

### 3.1.2 User empowerment public webinars

#### 3.1.2.1 *Purpose and Scope*

The aim of the user empowerment public webinars is to build up capacities on general aspects of the energy transition. They will be designed to clarify how to better deploy energy transition measures and actions, organised in different prioritised gaps. The scope and content of these webinars will be defined on the basis of the analysis carried out in Task 4.1. They can address social, technical, financial and legal aspects (e.g., legal advice on policy scenarios, public procurement strategies, funding possibilities, engagement strategies, technical assistance on ET, case studies, etc.) and cover fields like buildings, transport, waste and water, renewable energy generation, energy communities, energy poverty etc.

#### 3.1.2.2 *Expected / targeted Audience*

The user empowerment public webinars target a large variety of actors of all three levels of follower groups of the ePLANET project.

- Level 1: interested stakeholders
- Level 2: Platform Adopters and engaged stakeholders
- Level 3: Early Adopters and Actively Engaged Stakeholders

#### 3.1.2.3 *Format of the activity*

The user empowerment public webinars will be a series of around 6 online meetings (2 per pilot site) held via GoTO (or a similar online tool). As mentioned before, the content of each webinar will emerge from the analysis of WP4 and the format still needs to be defined (format preferences will be collected in Task 4.1). Finally, as user empowerment webinars are public, they will also be translated into English to encourage participation of stakeholders of three levels. Adequate time for discussion will be provided. The activities will be recorded and made available online and disseminated among the targeted audience via ePLANET and partners communication channels.

#### 3.1.2.4 *Timeline*

The user empowerment public webinars will take place from February 2023 (M18) until August 2024 (M36). The Discussion on the content for the webinars shall be started in M11 (July 2022).

*Table 3-3 User empowerment public webinars - timeline*

| # PUBLIC USER-EMPOWERMENT WEBINARS | QUARTER 1 (SEP-NOV) | QUARTER 2 (DEC-FEB) | QUARTER 3 (MAR-MAY) | QUARTER 4 (JUN-AUG) |
|---|---|---|---|---|
| Project year 1 | | | | Start Content discussion |
| Project year 2 | | | 3 | |
| Project year 3 | 3 | | | |

#### 3.1.2.5 *Involved Project Partners including their responsibilities*

*Table 3-4 User empowerment public webinars - Partner responsibilities*

| PUBLIC USER-EMPOWERMENT WEBINARS (L=LEAD, X=CONTRIBUTE) | CIMNE | ICAEN | CRES | FEDARENE | ICLEI | DDGI | RDFC | EAZK | LIMA | 3OC |
|---|---|---|---|---|---|---|---|---|---|---|
| Deciding on content | X | | X | X | X | X | X | X | X | L |
| Preparing training materials for webinars | X | | X | | | | | | X | L |
| Holding webinars | X | | X | | | X | X | X | X | L |
| Documentation and feedback | X | | X | X | | X | X | X | X | L |
| Follow up on the webinars | | | X | | | X | X | X | | L |

#### 3.1.2.6 *Expected impact, results and corresponding deliverable*

It is estimated that within the project duration ePLANET will improve the capacity and skills in delivering ET to 904 public officers and public authorities. In particular, with these public webinars we expect to reach around 720 stakeholders (average of 120 per webinar). Additionally, the ePLANET project will be recognized and participants attracted to closer follow the project (from level 1 towards level 3) and support the implement within and beyond the project focus area. These webinars support the continuous engagement actions of the ePLANET project.

### 3.1.3 User empowerment private workshops

#### 3.1.3.1 *Purpose and Scope*

User empowerment private workshops also seek to build up capacities on general aspects of the energy transition. Unlike webinars, workshops aim to bring hands-on material and tools on a specific topic to the pilot regions experts. Once more, the scope and content of these workshops will be defined based on the analysis carried out in Task 4.1. Thematic focus of workshops includes fields like buildings, transport, waste and water, renewable energy generation, energy communities, energy poverty etc.

#### 3.1.3.2 *Expected / targeted Audience*

The user empowerment private workshops target partners from the ePLANET consortium and key stakeholders from level 3 (early Adopters and Actively Engaged Stakeholders) of each pilot.

#### 3.1.3.3 *Format of the activity*

The user empowerment private workshops will be a series of 6 thematic workshops (2 per pilot site) organised in the pilot regions. The workshops will consist of keynotes and roundtables with experts on the prioritised topics. A session of the workshops will be dedicated to networking and the possibility to book face-to-face meetings with experts from the stakeholders' forum. As mentioned before, the content of each and format of each workshop will emerge from the analysis of WP4. A half-day activity is expected. Finally, user empowerment private workshops will be held in local languages to encourage participation of key local stakeholders. An active contribution of pilot partners is expected for workshop facilitation.

#### 3.1.3.4 *Timeline*

The user empowerment private workshops will take place from February 2023 (M18) until August 2024 (M36). The discussion on the content for the workshops shall be started in M11 (July 2022).

*Table 3-5 User empowerment private workshops - timeline*

| # USER EMPOWERMENT PRIVATE WORKSHOPS | QUARTER 1 (SEP-NOV) | QUARTER 2 (DEC-FEB) | QUARTER 3 (MAR-MAY) | QUARTER 4 (JUN-AUG) |
|---|---|---|---|---|
| Project year 1 | | | | Start Content discussion |
| Project year 2 | | | 3 | |
| Project year 3 | 3 | | | |

#### 3.1.3.5 *Involved Project Partners including their responsibilities*

*Table 3-6 User empowerment private workshops - Partner responsibilities*

| PRIVATE USER-EMPOWERMENT WORKSHOPS (L=LEAD, X=CONTRIBUTE) | CIMNE | ICAEN | CRES | FEDARENE | ICLEI | DDGI | RDFC | EAZK | LIMA | 3OC |
|---|---|---|---|---|---|---|---|---|---|---|
| Deciding on content | X | | X | X | X | X | X | X | X | L |
| Content and materials for workshops | X | | X | | | | | | X | L |
| Location and invitation | | | X | | | L | L | L | | |
| Holding workshops | X | | X | | | X | X | X | X | L |
| Documentation and feedback | X | | X | X | | X | X | X | X | L |
| Follow up on the workshops | | | X | | | X | X | X | | L |

#### 3.1.3.6 *Expected impact, results and corresponding deliverable*

It is estimated that within the project duration ePLANET will improve the capacity and skills in delivering ET to 904 public officers and public authorities. In particular, with these workshops we expect to reach around 240 stakeholders (average of 40 per workshop). Within the workshop learnings and expertise will be exchanged and to build up skills within and beyond the project participants. The activities might be (partly) recorded and made available online and disseminated among the targeted audience via ePLANET and partners communication channels.

## 3.2 Scale-up activities

The scale-up activities aim to include more public authorities into the project activities. The focus lies on the upscaling to around 145 more municipalities in Girona and Spain, all Crete regional municipalities together with additional Greece municipalities and around 119 more municipalities from the Zlín region. To include all these regions the ePLANET project team will offer webinars and workshops.

### 3.2.1 Scale up public webinars

#### *3.2.1.1 Purpose and Scope*

Pilot site partners will each organize 2 national webinars addressed to municipalities and local / regional authorities. The aim is to involve new municipalities and activate municipalities, which do not participate very active in the project. The goal of the scale up webinar is to engage municipalities more into the project and highlight the benefits of the project. The webinars will build on the developed training material (WP 4) to build up capacities and foster the usage of the platform.

#### *3.2.1.2 Expected / targeted Audience*

The audience of public scale up webinars is expected to come from the focus regions for the projects scale up activities (Girona & Spain, Zlín region & Czech, Crete & Greece). The regional project partner will invite local and regional authorities with a focus on authorities, which have not been very active or not been actively involved in the project.

The focus will be put on participants from public authorities and all three levels of follower groups of the ePLANET project.

- Level 1: interested stakeholders
- Level 2: Platform Adopters and engaged stakeholders
- Level 3: Early Adopters and Actively Engaged Stakeholders

#### *3.2.1.3 Format of the activity*

There will be 6 public scale up webinars (2 per pilot region) organized, aiming to disseminate ePLANET outcomes. The webinars will address the peer mentoring opportunities for authorities as well as display the platform. The specific agenda of each webinar will be defined within the pilot region taking the local needs and circumstances into account.

The webinars will be recorded and made available online both on the ePLANET website and on the project partners' website, to engage further municipalities which could not participate.

Each webinar will be summarized within an ePLANET template to be able to document the findings and lessons learned for other partners (overcome language barrier). The summary will be used to assess the overall impact of the action.

#### *3.2.1.4 Timeline*

The scale up webinars will take place starting in August 2023 (M24) and are projected to finish latest in August 2024 (M36).

The Discussion on the content and format for the webinars shall be started in March 2023 (M19).

The template for the webinar summary will be ready in Aug 2023 (M24).

*Table 3-7 Scale up public webinars - timeline*

| # SCALE UP PUBLIC WEBINARS | QUARTER 1 (SEP-NOV) | QUARTER 2 (DEC-FEB) | QUARTER 3 (MAR-MAY) | QUARTER 4 (JUN-AUG) |
|---|---|---|---|---|
| Project year 1 | | | | |
| Project year 2 | | | Start Content discussion | |
| Project year 3 | | 3 (1 per pilot) | | 3 (1 per pilot) |

#### 3.2.1.5 *Involved Project Partners including their responsibilities*

*Table 3-8 Scale up public webinars - Partner responsibilities*

| SCALE UP PUBLIC WEBINARS (L=LEAD, X=CONTRIBUTE) | CIMNE | ICAEN | CRES | FEDARENE | ICLEI | DDGI | RDFC | EAZK | LIMA | 3OC |
|---|---|---|---|---|---|---|---|---|---|---|
| Deciding on content | | X | X | X | X | X | X | L | | |
| Content and materials for webinars | X | | X | | | | | | X | L |
| Organisation, invitation and performance of webinar | | X | L | | | L | L | L | | |
| Preparation of Documentation template | | | X | L | X | X | X | X | | |
| Documentation and feedback | | | L | X | | L | L | L | X | |
| Follow up on the webinars | | | X | | | X | X | L | | |

#### 3.2.1.6 *Expected impact, results and corresponding deliverable*

The Scale up public webinars ensure that regional authorities not directly involved in the previous WPs will have access to the training material developed in WP4 to build their capacities and foster the usage of the platform. The aim is to include a total of 720 attendees (average of 120 per webinar).

The Scaling up public webinars are related to the deliverables D5.3 National Webinars' recordings and reports (x6) (M28 – needs to be revised as activity was extended until M36).

### 3.2.2 Scale up workshops

#### *3.2.2.1 Purpose and Scope*

Each pilot regions partner will organize a merged workshop between Covenant of Mayors and ePLANET. The workshop will have the main aim of promoting the development of Sustainable Energy and Climate Action Plan (SECAP) among not signatories in the pilot regions and the use of the platform as tool to increase their competences and develop/monitor their actions. The event will be also the occasion to display and transfer the best practice developed in WP6.

#### *3.2.2.2 Expected / targeted Audience*

The audience of public scale up workshops is expected to come from the focus regions for the projects scale up activities (Girona & Spain, Zlín region & Czech, Crete & Greece). The regional project partner will invite local and regional authorities with a focus on authorities, which have not been very active or not been actively involved in the project.

The focus will be put on participants from public authorities and level 2 and level 3 follower groups of the ePLANET project.

- Level 2: Platform Adopters and engaged stakeholders
- Level 3: Early Adopters and Actively Engaged Stakeholders

#### *3.2.2.3 Format of the activity*

The scale-up workshops will be a series of 3 in person meetings (1 per pilot site) organised by pilot region partner in cooperation with Covenant of Mayors. The format will be adapted to the regions needs and according to the developments within the ePLANET project.

Each workshop will be summarized within an ePLANET template to be able to document the findings and lessons learned for other partners (overcome language barrier). The summary will be used to assess the overall impact of the action.

#### *3.2.2.4 Timeline*

The private user-empowerment workshops will take place starting in February 2023 (M30) and are projected to finish latest in August 2024 (M36).

The Discussion on the content and format for the workshops shall be started in September 2023 (M25).

*Table 3-9 Scale up workshops - timeline*

| # SCALE UP WORKSHOPS | QUARTER 1 (SEP-NOV) | QUARTER 2 (DEC-FEB) | QUARTER 3 (MAR-MAY) | QUARTER 4 (JUN-AUG) |
|---|---|---|---|---|
| Project year 1 | | | | |
| Project year 2 | | | | |
| Project year 3 | Start Content discussion | | 3 (1 per region) | |

#### 3.2.2.5 *Involved Project Partners including their responsibilities*

*Table 3-10 Scale up workshops - Partner responsibilities*

| SCALE-UP WORKSHOPS (L=LEAD, X=CONTRIBUTE) | CIMNE | ICAEN | CRES | FEDARENE | ICLEI | DDGI | RDFC | EAZK | LIMA | 3OC |
|---|---|---|---|---|---|---|---|---|---|---|
| Deciding on content | | X | X | X | X | X | X | L | | |
| Content and materials for workshops | X | | X | | | | | | X | L |
| Organisation, invitation and performance of workshops | | X | X | | | L | L | L | | |
| Preparation of Documentation template | | | | L | X | X | X | X | | |
| Documentation and feedback | | X | X | X | | L | L | L | X | |
| Follow up on the workshops | | | | | | X | X | L | | |

#### 3.2.2.6 *Expected impact, results and corresponding deliverable*

The three Scale up workshops aim to include a total of 120 attendees (average of 40 per workshop) to ensure promoting the development of SECAPs among not signatories in the pilot regions and the use of the platform as tool to increase their competences and develop/monitor their actions. The event will be also the occasion to display and transfer the best practice developed in WP6. The activities might be (partly) recorded and made available online and disseminated among the targeted audience via ePLANET and partners communication channels.

The Scale up workshops are related to the deliverable D5.4 CoM ePLANET workshops reports (x3) (M35).

### 3.2.3 Public conferences

The ePLANET project outcomes, including the ePLANET platform and the governance methodology, will be presented in the framework of 6 public conferences in pilot countries (2 per pilot country). ePLANET will present the project results (e.g., scientific papers) on public conferences organized by third parties, ePLANET will not organise any public conferences.

Targeting the different stakeholders of the project at supra-regional and national level, these public presentations will aim to facilitate the upscaling of the ePLANET tools at national level, in the 3 pilot countries. The expected audience of these public presentations is 40 attendants each. This activity is complementary to the 2 presentations at EU-wide level public conferences, and will be implemented in T7.5 (starting at M7).

## 3.3 EU wide replication

The EU wide replication activities aim on the close involvement of follower regions and tailored support for the implementation of ePLANET results, receiving guidance for the development of ePLANET tools as well as on building up skills in European regions outside the project area.

### 3.3.1 Open Call for Twinning / Follower Regions

#### *3.3.1.1 Purpose and Scope*

The open call for follower regions will initiate the replication process. It aims to attract regions (public authorities) to follow the projects development and to select up to 6 follower regions (2 twinning regions per pilot site) based on clear objective criteria and transparent process. For the selected regions, a set of replication and support activities is planned (see chapter 3.4).

The open call will explain benefits for potential follower regions and promote the project. By becoming a regional partner, regions qualify for specific joint exchange activities and capacity building tailored to their needs including thematic workshops, private webinars, face-to-face meetings with experts, as well as site visits. The Call will be first promoted among FEDARENE and project partners' networks, as well as among Covenant of Mayors coordinators and supporters.

#### *3.3.1.2 Expected / targeted Audience*

The open call for follower regions targets regions in particular their public authorities within the European Union.

#### 3.3.1.3 *Format of the activity*

The Open Call for Follower Regions will be launched online on the platform EUSurvey (or similar). Interested follower regions will have to apply online with stating their motivation for contribution and provide basic information. Based on the requirements for follower regions shown in chapter 3.3.1.7 twinning regions will be selected. The partners from the three ePLANET pilot regions will first evaluate the applications and submit their results to FEDARENE who will summarize the results and best match the candidate regions with the ePLANET pilot regions. The results of the assessment as well as the process will be processed in an evaluation report.

#### 3.3.1.4 *Timeline*

*Table 3-11 Open call - timeline*

| OPEN CALL | QUARTER 1 (SEP-NOV) | QUARTER 2 (DEC-FEB) | QUARTER 3 (MAR-MAY) | QUARTER 4 (JUN-AUG) |
|---|---|---|---|---|
| Project year 1 | | | M7: Open Call launched (D5.5/MS3) | Selection of follower regions<br>Month 12: Evaluation report with assessment criteria matrix (D5.6) |

#### 3.3.1.5 *Involved Project Partners including their responsibilities*

*Table 3-12 Open call - Partner responsibilities*

| OPEN CALL (L=LEAD, X=CONTRIBUTE) | CIMNE | ICAEN | CRES | FEDARENE | ICLEI | DDGI | RDFC | EAZK | LIMA | 3OC |
|---|---|---|---|---|---|---|---|---|---|---|
| Coordinate actions | | | | L | X | | | | | |
| Define Assessment Criteria Matrix | | X | X | L | X | X | X | X | | |
| Prepare Open Call | | | X | L | X | X | X | X | | |
| Promote Open Call | X | X | X | L | X | X | X | X | X | X |
| Evaluate potential follower regions applications | | X | X | L | X | X | X | X | | |
| Prepare Evaluation Report | | X | X | L | X | X | X | X | | |

#### *3.3.1.6 Expected impact, results and corresponding deliverable*

The Open Call for follower regions will contribute to the visibility of the project. The project partners will promote the open call among others within their networks like Covenant of Mayors and their members especially FEDARENE and ICLEI. Therefore, the project results will be disseminated already at an early project state, which enables other regions to benefit and contribute to the project.

The ePLANET results will be introduced and implemented in 6 follower regions. Due to the inclusion of these follower regions, it is expected to address more than 100 local authorities and 17 regional authorities. This will lead to faster reduction of the Primary Energy Consumption.

#### *3.3.1.7 Assessment Criteria*

The selection of the successful follower regions will be based on a concise list of criteria agreed by all project partners following a clear objective criteria and transparent process. Selection criteria will be organised in groups based on specific requirements, as follow:

- Eligibility criteria.
- Required Qualification criteria.
- Desirable Qualification criteria.

The definition of the assessment criteria will be performed by FEDARENE with the help from ICLEI and pilot region partners based on the initial list of criteria, which will be duly appropriated

- motivation to participate,
- basic knowledge about the project theme,
- availability to participate in the joint exchange actions,
- availability to evaluate joint exchange activities,
- current status of SECAPs or ET plans,
- ongoing ET initiatives,
- availability of data (important for data exchange and collaboration) and
- language knowledge.

### 3.3.2 Stakeholder Forum

#### *3.3.2.1 Purpose and Scope*

The Stakeholder Forums are designed to engage external experts into an exchange with the ePLANET team and follower regions. The first aim is to receive advice and guidance during the implementation phase of the project and the second to ensure the sustainability of the ePLANET activities in the long run and beyond the project.

For the design of the Stakeholder Forums structure, the user centred learning and capacity-building approach will be used. The selection of topics and external experts for the Stakeholder Forums will be based on the real needs of future ePLANET users, in order to ensure the future

adoption of ePLANET outcomes by public authorities. The Stakeholder Forums will cover a broad spectrum of themes related with the digitalization of measures and plans, development of an interoperable ecosystem of data and tools, energy transition decision making, etc.

In the beginning of the project, the Stakeholder Forums will focus on acquiring additional knowledge and gaining feedback. This will for example include forums on lessons learned from comparable projects and initiatives or feedback on the design and intended usage of the ePLANET platform and to the ePLANET approach.

In the second phase, the focus will shift towards supporting a sustainable implementation and the usage of the tools after the end of the project. The shift from the first to the second phase is planned to happen in the second year of the project. The timing of the change will be discussed by the project partners at the end of the first project year and will depend on the further needs for advice and guidance as well as the progress of the ePLANET platform and tools.

#### *3.3.2.2 Expected / targeted Audience*

The Stakeholder Forums will focus on the inclusion of the level 3 followers of the project and establish a bidirectional exchange for public authorities, early-adopters, stakeholders and specialists (urban designer & planners, sustainability and energy experts, ESCo, industry sector, investors and civil society). Level 2 followers can be invited if suitable.

#### *3.3.2.3 Format of the activity*

The stakeholder Forum will be a series of around 12 online meetings held via ZOOM (or similar online tools). Each stakeholder forum is supposed to have at least one thematic input from an external expert or a project partner. The forum will provide adequate time for discussions. The overall duration is supposed to be one hour. Adaptions to the format can be made after the first meetings according to the lessons learned and feedback from the participants.

#### *3.3.2.4 Timeline*

*Table 3-13 Stakeholder Forums - timeline*

| # STAKEHOLDER FORUMS | QUARTER 1 (SEP-NOV) | QUARTER 2 (DEC-FEB) | QUARTER 3 (MAR-MAY) | QUARTER 4 (JUN-AUG) |
|---|---|---|---|---|
| Project year 1 | 0 | 1 | 1 (+1) | 1 |
| Project year 2 | 1 | 1 | 1 | 1 |
| Project year 3 | 1 | 1 | 1 | 1<br>Stakeholder forum engagement reports (D5.2) |

#### 3.3.2.5 *Involved Project Partners including their responsibilities*

*Table 3-14 Stakeholder Forum - Partner responsibilities*

| STAKEHOLDER FORUM (L=LEAD, X=CONTRIBUTE) | CIMNE | ICAEN | CRES | FEDARENE | ICLEI | DDGI | RDFC | EAZK | LIMA | 3OC |
|---|---|---|---|---|---|---|---|---|---|---|
| Coordinate Actions | | | | L | X | | | | | |
| Organise, host and document forums | | | | L | X | | | | | |
| Documentation of Feedback and lessons learned | | | | L | X | | | | | |
| Promote Stakeholder Forums | X | X | X | L | X | X | X | X | X | X |
| Engage and invite Stakeholder | | X | X | L | X | X | X | X | | |
| Active participation | X | X | X | X | X | X | X | X | X | X |

#### 3.3.2.6 *Expected impact, results and corresponding deliverable*

The Stakeholder Forums ensure that the project will be well guided and learnings from other projects will be included to avoid unnecessary difficulties during the design and implementation phase. These forums will continuously engage the 3rd level followers and provide a bidirectional information pathway with other stakeholders like urban designer & planners, industry sector, investors and civil society.

In total there will be around 12 online meeting (4/year) engaging 150 facilitators and other stakeholders.

The activities will be summarised in the Stakeholder forum engagement report. These reports correspond to Deliverable 5.2 and will be published in project month 36.

### 3.3.3 Public conferences

The ePLANET project outcomes, including the ePLANET platform and the governance methodology, will be presented in 2 EU-wide level public conferences. ePLANET will present the project results (e.g., scientific papers) on public conferences organized by third parties, ePLANET will not organise any public conferences.

Targeting the different stakeholders of the project at EU-wide level, these public presentations will aim to facilitate the replication of the ePLANET tools at EU level. The expected audience of these public presentations is 40 attendants each. This activity is complementary to the 6 presentations at public conferences in the pilot regions, and will be implemented in T7.5 (starting at M7).

### 3.3.4 Final event

The final event is a dissemination event at European level, to show results and conclusions of the developed ePLANET platform and to engage extra users for its expansion beyond the project duration.

#### *3.3.4.1 Purpose and Scope*

The purpose of this final event is to facilitate the replication of the developed platform and its use by sharing the project experience, presenting an overview of the benefits based on achieved results from the practical development and its testing in the different pilot regions. Other best practices with similarities to ePLANET will be considered to be presented as supportive drivers to boost and expand ePLANET use after this conference.

The scope of this event is to cover all countries of the EU, where the developed transition model and methodology could be implemented.

#### *3.3.4.2 Expected / targeted Audience*

This model has to be implemented by local and regional authorities with the support of a variety of stakeholders including local, regional or national energy agencies. So, the audience to be invited for this final event are firstly municipalities of EU countries, energy agencies as facilitators for local and regional authorities, and a broad range of stakeholders as advisors like urban designer & planners, sustainability and energy experts, ESCo, industry sector or investors.

#### *3.3.4.3 Format of the activity*

This event is planned to be a physical presence meeting in Brussels unless travel restrictions or the pandemic situation requires an online event, which is not expected as it will take place in more than 2 years from now. The idea is to structure the event in two parts plus an introduction.

- Initial introduction and presentation (FEDARENE and ICLEI)
- In the first part, each pilot partner should present the implementation process of ePLANET tools including difficulties and barriers encountered during the process as well as lessons learned and benefits (DDGI, EAZK, RDFC). Potentially the platform structure (CIMNE) and the trainings packages (3OC) will be presented.
- In the second part, follower regions or experts (to be determined) should make a presentation (maximum 30 minutes) on a prospective to facilitate the process for any

European municipality in implementing the same process, explaining other best practices out of the ePLANET. In this part, contributions from representatives from other Energy transition projects (e.g., H2020, MED, LIFE) can be included.

- Initiate discussion of about an hour with all invited entities and companies. (LIMA, ICAEN)

The final format will be defined approximately in November 2022.

#### *3.3.4.4 Timeline*

The event has to be done between months 25 and 36 that is during the last year of the project. It is supposed to be in Brussels.

Best date should be 3 or 4 months before the end of the project, possibly matching it with a final or pre-final project meeting of the consortium. Proposed month is M33 (May 2023) prior to the holiday season with a duration of approximately 4 hours.

All partners contribute to the invitation list which will be done 5 months prior the event and actively invite participants beginning 3 months before the event.

*Table 3-15 Final event - timeline*

<table>
<tr><th>M 25<br>SEPT. ‘22</th><th>M 26<br>OCT. ‘22</th><th>M 27<br>NOV. ‘22</th><th>M 28<br>DEC. ‘22</th><th>M 29<br>JAN. ‘23</th><th>M 30<br>FEB. ‘23</th></tr>
<tr><td rowspan="2">Getting back on the approach of<br>Final Event</td><td colspan="2">Reformulation of the Final Event. To be finished by end of November</td><td></td><td colspan="2">Select Venue. First Proposal:<br>In Espai Catalunya-Europa<br>(Central Brussels)</td></tr>
<tr><td></td><td colspan="2">List of target audience to be invited. To be finished by December.</td><td colspan="2">Definitive version of the Final Event</td></tr>
<tr><th>M 31<br>MARCH ‘23</th><th>M 32<br>APRIL ‘23</th><th>M 33<br>MAY ‘23</th><th>M 34<br>JUNE ‘23</th><th>M 35<br>JULY ‘23</th><th>M 36<br>AUGUST ‘23</th></tr>
<tr><td colspan="2">Invitation of attendees.<br>Prepare for Event: presentations of speakers, etc.</td><td>Final Event<br>conducting</td><td colspan="2">Follow up inputs and interests of attendees</td><td>Final report</td></tr>
</table>

#### 3.3.4.5 *Involved Project Partners including their responsibilities*

*Table 3-16 Final event - Partner responsibilities*

| FINAL EVENT (L=LEAD, X=CONTRIBUTE) | CIMNE | ICAEN | CRES | FEDARENE | ICLEI | DDGI | RDFC | EAZK | LIMA | 3OC |
|---|---|---|---|---|---|---|---|---|---|---|
| Coordinate Actions and organise event | | L | | X | | | | | | |
| Contribute to invitation list and promote event | X | L | X | X | X | X | X | X | X | X |
| Active participation | X | L | X | X | X | X | X | X | X | X |
| Documentation and follow up + focus on potential regions for implementation | X | L | | | | | | | | |

#### 3.3.4.6 *Expected impact, results and corresponding deliverable*

In the final event, at least 50 attendees are expected which are listed in the participants list.

This event helps to involve potential implementors and support the impact after the project duration. New ePLANET users will be identified on the event and a link to them established to allow a follow up to figure out the real interest in using the ePLANET platform and their real interest in setting up new energy transition projects.

## 3.4 Joint exchange activities for follower regions

The joint exchange activities for follower regions are designed to support the implementation of ePLANET results in the selected European regions according to the specific needs and challenges.

### 3.4.1 Follower regions study-visits in ePLANET joint exchange pilot region

This bilateral peer capacity building activity is part of Task 5.3 and foresees physical visits, where selected follower region (see chapter 3.3.1) and the associated pilot partner meet. However, as the current pandemic has demonstrated, travels may not always be possible the partners reserve the right to postpone or rearrange the activities whenever necessary or to organize online peer events instead.

#### 3.4.1.1 *Purpose and Scope*

The study visits of ePLANET are conceived as learning expeditions from follower regions (territories with less mature plans on energy transition) to the regions already using the ePLANET platform and governance. The aim of this activity is to learn more about best practices in place and to exchange experience on how to implement ePLANET tools and approaches best into activities and structure of local and regional authorities.

#### 3.4.1.2 *Expected / targeted Audience*

The study visits are foreseen for follower regions and focus on local and regional authorities or corresponding energy agencies. They are considered as level 2 followers of the ePLANET project.

#### 3.4.1.3 *Format of the activity*

Three study visits will be organized, 1 per pilot site, tailored to the needs of the follower regions of each pilot site. Up to two people per follower region will visit for up to two days the pilot region.

Each pilot site offers a tailored study visits according the needs of its follower regions. The visits could include presentation on tools, site visits, workshops, sharing experience, effective means of training, etc. with the aim to support the implementation of ePLANET in the follower regions.

#### 3.4.1.4 *Timeline*

The study visits are supposed to take place between February 23 (M18) and April 24 (M32). After the successful selection of the follower regions in August 22 (M12) the content for the study visits and the timing will be elaborated with the identified follower regions.

#### 3.4.1.5 *Involved Project Partners including their responsibilities*

*Table 3-17 Study visits - Partner responsibilities*

| STUDY VISITS (L=LEAD, X=CONTRIBUTE) | CIMNE | ICAEN | CRES | FEDARENE | ICLEI | DDGI | RDFC | EAZK | LIMA | 3OC |
|---|---|---|---|---|---|---|---|---|---|---|
| Coordinate Actions and organise visits | | X | X | | | L | L | L | | |
| Design evaluation template | | X | X | L | | X | X | X | | |
| Report on activities | | | | | | L | L | L | | |

#### 3.4.1.6 *Expected impact, results and corresponding deliverable*

Due to the study visits, the ePLANET tools and activities can be easier understood and replicated in the follower regions. Hands on support from different stakeholders within the pilot region is provided to the follower regions. The activity supports the phase 2 transferring and expansion of ePLANET and helps to include and build up skills in 101 local and 17 regional authorities outside the pilot countries (see 5.1).

There is one deliverable in WP4 covering study visits and one deliverable in WP5:

- D4.3 – Report on training materials (M29)
- D5.7 - Reports on joint exchange activities experiences (M32)

### 3.4.2 Technical support visits of ePLANET experts to follower regions

This bilateral peer capacity building activity is part of Task 5.3 and foresees physical visits, where ePLANET experts travel to the follower region (see chapter 3.3.1). However, as the current pandemic has demonstrated, travels may not always be possible the partners reserve the right to postpone or rearrange the activities whenever necessary or to organize online peer events instead.

#### 3.4.2.1 *Purpose and Scope*

The technical support visits of ePLANET experts to follower regions are designed to support the implementation of ePLANET results in the follower regions. According to the challenges of each follower region up to two experts from the ePLANET team will be selected to best support the follower regions ambitions on implement ePLANET results.

#### 3.4.2.2 *Expected / targeted Audience*

The visits are foreseen for follower regions and include all key stakeholders. Although the main focus is on local and regional authorities and energy agencies it could be necessary to include other regional stakeholders.

#### 3.4.2.3 *Format of the activity*

One support visit per follower region (up to 6 in total) will be organized. The visits will be tailored to the challenges of each follower region. According to the situation in the follower region, the best suitable ePLANET experts will be identified to provide knowledge and experience. Experts will be selected according to their experience, for example concerning questions on governance ICAEN, on digitalization CIMNE or on user empowerment 3OC.

The purpose of the support visit will be defined together with each follower region.

#### 3.4.2.4 *Timeline*

The technical support visits are supposed to take place between February 23 (M18) and April 24 (M32). After the successful selection of the follower regions in August 22 (M12) the content for the support visits and the timing will be elaborated with the identified follower regions.

#### 3.4.2.5 *Involved Project Partners including their responsibilities*

*Table 3-18 Support visits - Partner responsibilities*

| SUPPORT VISITS (L=LEAD, X=CONTRIBUTE) | CIMNE | ICAEN | CRES | FEDARENE | ICLEI | DDGI | RDFC | EAZK | LIMA | 3OC |
|---|---|---|---|---|---|---|---|---|---|---|
| Coordinate Actions | X | | | L | | | | | | |
| Design support visits | X | X | X | L | X | X | X | X | X | X |
| Perform support visit to follower region | X | X | X | X | X | | | | X | X |
| Design evaluation template | X | X | X | L | X | | | | X | X |
| Report on activities | X | X | X | X | X | | | | X | X |

#### 3.4.2.6 *Expected impact, results and corresponding deliverable*

Due to the study visits, the ePLANET tools and activities can be easier understood and replicated in the follower regions. Hands on support from different experts from ePLANET is provided to the follower regions. The activity supports the phase 2 transferring and expansion of ePLANET and helps to include and build up skills in 101 local and 17 regional authorities outside the pilot countries (see 5.1). The results are reported within the deliverable D5.7 - Reports on joint exchange activities experiences (M32).

### 3.4.3 Remote support from ePLANET experts for follower region

#### 3.4.3.1 *Purpose and Scope*

The purpose of the remote support from ePLANET experts to follower regions is to make the implementation of ePLANET results as easy as possible for the follower regions. Therefore, the designated projects experts will be available for different kind of questions (e.g., technical,

capacity building, governance) and further provide support in a wide variety of EU languages (e.g., English, German, French, Spanish, Czech, Greek, Italian, Portuguese) to reduce barriers for follower regions to get or stay in touch with ePLANET.

#### *3.4.3.2 Expected / targeted Audience*

It is expected that all key stakeholders including public authorities contact ePLANET experts. The stakeholders are envisaged to be mainly level 2 and partly level 1 followers of the project.

#### *3.4.3.3 Format of the activity*

The activity will be performed need driven. A list of experts and their qualifications will be made available within the follower regions to allow the follower regions to contact the perfect ePLANET expert for their specific question. The remote support will be offered via mail or phone or within webinars.

#### *3.4.3.4 Timeline*

The remote support will be established at the same time as the follower regions are selected which is supposed to be in August 2022 (M12). The allocation of responsibilities and collection of contact details will start after the open call and finish before the selection of followers.

*Table 3-19 Remote support - timeline*

| REMOTE SUPPORT | QUARTER 1 (SEP-NOV) | QUARTER 2 (DEC-FEB) | QUARTER 3 (MAR-MAY) | QUARTER 4 (JUN-AUG) |
|---|---|---|---|---|
| Project year 2 | Start remote support | Ongoing support | Ongoing support | Ongoing support |
| Project year 3 | Ongoing support | Ongoing support | Ongoing support | Ongoing support |

#### 3.4.3.5 *Involved Project Partners including their responsibilities*

*Table 3-20 Remote support - Partner responsibilities*

| REMOTE SUPPORT (L=LEAD, X=CONTRIBUTE) | CIMNE | ICAEN | CRES | FEDARENE | ICLEI | DDGI | RDFC | EAZK | LIMA | 3OC |
|---|---|---|---|---|---|---|---|---|---|---|
| Coordinate Actions | | | | L | | | | | | |
| Allocate experts and design remote support contact list | X | X | X | L | X | X | X | X | X | X |
| Remote support activities | X | X | X | X | X | X | X | X | X | X |
| Design evaluation template | | | | L | | | | | | |
| Report on activities | X | X | X | L | X | X | X | X | X | X |

#### 3.4.3.6 *Expected impact, results and corresponding deliverable*

Due to the remote support activities, the ePLANET results are more easily implemented in regions outside the project pilot regions. The activity supports the phase 2 transferring and expansion of ePLANET and helps to include and build up skills in 101 local and 17 regional authorities outside the pilot countries (see 5.1). The results of these activities are reported within the deliverable D5.7 - Reports on joint exchange activities experiences (M32).

# 4 Engagement Strategy

## 4.1 Strategic Approach

An engagement strategy is designed to ensure a constant involvement and feedback loop from the ePLANET key stakeholders, such as urban planning, technical, financial and legal professionals and specialists, local, regional and supra-regional authorities and energy agencies not directly involved in the consortium, European Commission (EC), the European Climate, Infrastructure and Environment Executive Agency representatives, CoM representatives, etc.

The engagement strategy is an integral part of the Replication and Networking Plan and has a strong synergy with other sections of this plan as well as a close link with the ePLANET Communication and Dissemination Plan (deliverable D7.1). Successful implementation of the engagement strategy depends on coordinated activities of all project partners during the whole project period and beyond.

A systemic and participative approach to the stakeholder engagement in the ePLANET project activities will help to facilitate and ease the adoption of coordinated ET actions by the public sector, by setting a new framework to share information in a harmonised common language and by deploying a "clustering governance" strategy based on a digital platform.

ePLANET stakeholder engagement activities throughout the project will follow seven guiding principles, as shown in the Figure 4-1.

*Figure 4-1 Guiding principles for stakeholder engagement*

ePLANET stakeholder engagement activities will also have a strong coherence with the Open Science policy and approach focusing on spreading knowledge as soon as it is available using the following stakeholder engagement activities:

- Stakeholder Forum.
- Local campaigns (i.e., user empowerment public webinars, user empowerment private webinars and workshops).
- Scale-up activities (i.e., scale up webinars and workshops, public conferences).
- EU wide replication activities (i.e., public conferences; final event).
- Joint exchange for follower regions (i.e., study visits, remote support).

The ePLANET project partners will share knowledge and data gained throughout the project activities with all relevant actors as early as possible. Stakeholders from public sector (i.e., local, regional and national authorities, energy agencies, urban designer and planners), private sector (i.e., industry, investors), academia, civil society, etc. will be invited to participate in the project activities.

The continuous engagement strategy will follow the 3-tier approach and aim to widen the impact of the ePLANET project. This approach will create 3 different groups with progressive engagement levels. First tier for the less motivated. Third tier for the most motivated. Public authorities and stakeholders will have the possibility to participate in any of the groups, depending on their own motivations and the responsibilities they can assume. This engagement approach will maximise the further adoption of ePLANET tools by public authorities.

Most engaged tier will be involved in more requesting activities, and less engaged tier will have lighter involvement in activities. A brief description of the engagement strategies for the different level stakeholder is presented in the next sub-items.

### 4.1.1 Engaging Stakeholder level 1

The stakeholders in this category are defined as "interested stakeholders" and will have access to the public activities only, with no envisioned responsibilities.

The involvement of these stakeholders is limited to receiving newsletters and participating in public webinars. The effort to engage them will be based on the dissemination and communication processes based on the official channels defined in D7.1, continuous monitoring of the number of newsletter subscribers, periodicity of publications and on the feedback provided after their participation in webinars, in order to identify the level of satisfaction with the topics covered.

### 4.1.2 Engaging Stakeholder level 2

Platform adopters and engaged stakeholders are part of this category. They would have access to tailor-made activities, will use and provide feedback on the ePLANET platform, will be signatories of the Memorandums of Adhesion and partly act as ePLANET facilitators. Activities for this group involve receipt of newsletters, participation on public and private webinars, workshops and site visits.

Feedback received regarding public and private webinars as well as workshops and site visits about the level of satisfaction with the topics discussed and developed activities and willingness to participate will help to assess the quality and results of the stakeholder involvement at this level. To this end, satisfaction surveys might be conducted at the end of each event.

An important responsibility of this stakeholder group is to assess the correct functioning of the ePLANET platform. Getting a notion of users' experiences and their evaluations is of vital importance for the proper functioning of the platform. Therefore, feedback collection should be a continuous effort. Feedback will allow the consortium partners to understand and analyse specific information about user activities and platform bugs. The implementation of a bug-tracker action based on a dedicated e-mail address might be helpful in this case. In the

hypothesis of users discovering a bug in the platform, they can use this email address to report it and once the developers receive the message, the found error can be coded and its impact on the platform evaluated. In this way, it will be possible to prioritize it and start working on the solution of the problem. Developers need to keep updated the status of the bug reported, so that users develop a sense that they have a key role in improving the platform.

### 4.1.3 Engaging Stakeholder level 3

Early adopters and actively engaged stakeholders belong to this category. They are the most motivated and have the highest level of responsibilities. Activities for this group involve receipt of newsletters, participation on public and private webinars, workshops, site visits, and working groups as well as at the Stakeholders Forum´s meetings. The 3rd level stakeholders will be signatories of the MoA, they will use and provide feedback on the ePLANET platform and act as ePLANET facilitators. Regular assessment of the stakeholder satisfaction, motivation and contribution into ePLANET project activities as well as of the regularity of participation will help to improve engagement experiences of stakeholders.

In order to maximize the effectiveness of engagement of stakeholders in the Stakeholders Forum meetings it is important to focus attention on the following actions:

- To bring together experts and stakeholders for the exchange of opinions, information and experiences.
- To share project findings with the stakeholders, to get feedback and further input for the project (i.e., ePLANET approach, ePLANET platform, tools).
- To implement and strengthen the user centred approach by collect feedback from the stakeholders on the ongoing activities.

The stakeholders in this group are subject to the same communication channels and processes, described for the two previous groups, as well as the application of satisfaction questionnaires on events and activities developed. As they are a more engaged group, they will have a participatory role in the definition of some key activities of the project, such as suggesting the content to be presented and discussed in webinars, workshops or even in the discussion of what is expected in site visits.

Regarding the platform itself, a selected group from this level can act as a focus group, being approached by developers to perform specific operations on the platform with the aim of testing and responding to dedicated surveys. The collection of feedbacks from early adopters aims at early-stage amelioration process of the platform functionalities and user experience.

## 4.2 Different needs of and messages for different Stakeholder Groups

The key messages and their respective objectives were defined in deliverable D7.1 - Communication and Dissemination Plan, item 3.4 - and divided according to specific target audiences. In summary, the main messages refer to the fact that:

- ePLANET is designed for the whole community of EU public authorities.
- ePLANET seeks to become a decision-making supporting tool for public authorities.

- ePLANET aims to improve the vertical and horizontal governance of ET at the whole territory and the accomplishment of the national energy savings and RES objectives.
- ePLANET will foster the digital transformation of sustainable energy plans by promoting the first platform to combine a global set of harmonized measures and policies within a big-data analytics engine, allowing systematic data integration in digital computer processing enabled form, direct comparison and analysis of ET measures, policies and data through a Common Data Model.
- For the general public, the main objective of ePLANET is to raise awareness on ET strategies and measures, and ePLANET project & outcomes. It is important that the general public realises about the steps governments are taking in the energetic transition and the eco-friendly scope.

Table 4-1 presents an overview of needs and tailored messages for each stakeholder group.

*Table 4-1 Overview of needs and tailored messages for stakeholder groups*

| TYPE OF EVENT | NEEDS & MESSAGES | STAKEHOLDERS GROUP |
|---|---|---|
| Stakeholders Forum | To collect feedback from the stakeholders on the ongoing activities | Early adopters and the most interested and active stakeholders (Level 3) |
| Local campaigns | To push public stakeholders from Level 1 to Level 2 (or even 3) | Regional and national authorities, as well as municipalities (including those from the pilot territory but not directly involved in the WP2, WP3 and WP4) |
| Scale up webinars | To use the training materials developed in WP4 to build capacities of the municipalities and local / regional authorities and foster the usage of the ePLANET platform | Municipalities and local / regional authorities not directly involved in the WP2, WP3 and WP4 |
| Scale up workshops | To promote the development of SECAP among not signatories in the partners´ regions and the use of the ePLANET platform as tool to increase their competences and develop / monitor their actions<br>To showcase and transfer the best practice developed in WP6 | Municipalities and local / regional authorities not signatories in the partners´ regions |
| Joint exchange activities | Bilateral peer capacity building activities, carried out in the form of physical visits or online events | Pilot partners and follower regions |

## 4.3 Assignment of activities and Stakeholders Groups

Assignment of the stakeholder engagement activities will be implemented on a regular basis, including the following tasks:

- After each Scale up webinar, pilot site partners will draft a summary report (template provided by FEDARENE) that will be used to assess the overall impact of actions.
- At the end of each Scale up workshop, the related pilot site partner will draft a summary report (template provided by FEDARENE).
- An evaluation of the bilateral joint exchange activities will be carried out. FEDARENE will provide each project partner with an evaluation template to compare and capitalize on experience. Evaluation will not be a one-time exercise but will be organised by the project partner all along the implementation of WP5 activities. An evaluation report from each region will be prepared and published online by the project partner, in line with GDPR and data protection rules and common practices.
- Questionnaires will also be handed over to participating follower regions in order to get an overall evaluation of how well the joint exchange delivered the expected outcomes and results. These will help measure ePLANET performance and promote lessons learnt.
- A final report will be developed, including feedback coming from questionnaires and joint exchange activities reports, reporting the overall evaluation of the implementation of the peer learning, networking and replication activities.

# 5 Monitoring and Evaluation of the replication and networking plan

The monitoring and evaluation of the replication and networking actions will be controlled through the deliverables of WP5 and through attendance registration in each of the organized events.

## 5.1 Measurement of Expected Impact (EI)

Within the Key Performance Indicators (KPI) of ePLANET there are some of them specifically addressing the monitoring of the replication and networking activities. Table 5-1 summarizes the impact indicators related to the replication and networking actions

*Table 5-1 Overview WP5 related impact indicators*

| EXPECTED IMPACT (EI) | PHASE 1: TESTING AND PILOT DEPLOYMENT | | PHASE 2: TRANSFERRING AND EXPANSION | | TOTAL |
|---|---|---|---|---|---|
| **EI-1** | **NUMBER OF STAKEHOLDERS ACTIVE IN DELIVERING THE ET** | | | | **764** |
| Local authorities | Crete<br>Girona<br>Zlín region | 16<br>67<br>61 | Greece<br>Catalonia<br>CZ Rep<br>Other EU regions | 62<br>145<br>119<br>101 | 78<br>212<br>180<br>101 |
| Regional authorities | Crete<br>Girona<br>Zlín region | 2<br>2<br>2 | Greece<br>Catalonia<br>CZ Rep.<br>Other EU regions | 9<br>6<br>10<br>17 | 11<br>8<br>12<br>17 |
| | ePLANET facilitators within Public Administration | | | 100 | |
| Other stakeholders (private sector) | | 75 | | 75 | 150 |
| **EI-2** | **NUMBER OF COLLABORATIONS ON THE ET BETWEEN PA** | | | | **603** |
| Local authorities | Crete<br>Girona<br>Zlín region | 16<br>67<br>63 | Greece<br>Catalonia<br>CZ Rep.<br>Other EU regions | 60<br>145<br>119<br>101 | 76<br>212<br>182<br>101 |
| Regional authorities | Crete<br>Girona<br>Zlín region | 1<br>1<br>1 | Greece<br>Catalonia<br>CZ Rep.<br>Other EU regions | 6<br>4<br>7<br>12 | 7<br>5<br>8<br>12 |
| **EI-3** | **NUMBER OF PUBLIC AUTHORITIES AND PUBLIC OFFICERS WITH IMPROVED CAPACITY / SKILLS IN DELIVERING THE ET** | | | | **904** |
| **EI-4** | **NUMBER OF POLICIES INFLUENCED THROUGH THE ACTION** | | | | **32** |

## 5.2 Monitoring and evaluation

Every Impact indicator will be monitored through different mechanisms:

- EI-1 will be monitored and verified through the signatures of ePLANET Memorandums of Adhesion and the registration in events and actions carried out by ePLANET
- EI-2 will be monitored and verified by the ePLANET Memorandums of Adhesion signed by all Public Administration Participants involved
- EI-3 will be monitored and verified through registered participants from Public Administration and Public Officers using ePLANET tools or receiving training materials.
- EI-4 will be monitored and verified by ePLANET MoA signed by Public Administration participants of all public administration level.