

TrustEE

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TrustEE

INNOVATIVE MARKET BASED TRUST FOR ENERGY EFFICIENCY INVESTMENTS IN INDUSTRY

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1 Background

Cost savings and regulations are often cited as drivers for energy efficiency (EE) and renewable energy (RE) projects in the industrial sector. While these projects can also yield other benefits and be financially attractive, the investment potential in Europe remains largely untapped.

Several barriers impede industrial focused EE and RE project development in Europe. Local financiers may lack sufficient expertise and experience to appropriately evaluate technical performance risks, and therefore inflate risk premiums. Projects are often too small relative to lenders' capital requirements, or the project structuring and transaction costs are too great. In addition, project developers or industrial owners, especially smaller to medium size enterprises, may lack the performance or credit guarantees necessary to obtain viable financing.

While energy performance contracting is a viable option for large projects, credit exposure is a barrier for SMEs (technology and project suppliers) who wish to offer energy performance contracts. For example smaller companies may exceed their credit lines when offering a contract term of 24 months.

2 Vision

TrustEE is a three-year project (2016-2019) financed by the European Commission Horizon 2020 Framework Programme for Research and Innovation. The vision for the project is to help achieve Europe's significant industrial energy efficiency and renewable energy potential. The TrustEE vision aligns with and supports the EU 2020 climate and energy targets, including a 20% cut in greenhouse gas emissions, 20% of EU energy from renewables, and 20% improvement in energy efficiency. It also supports the Horizon 2020 goals to drive economic growth and create jobs in Europe.

To realise this vision TrustEE establishes standard processes and tools to streamline project assessment, and secures refinancing for commissioned energy efficiency (EE) and renewable energy (RE) projects in industry. The focus is on small and medium size enterprises implementing energy efficiency measures (e.g., heat exchangers for waste heat recovery), and renewable energy installations like solar thermal, biomass and biogas that replace fossil fuel-based process heating sources.¹

3 Purpose & scope

The TrustEE consortium shall implement a phased communication and dissemination plan to support two main project phases, as described in Section 4 of this plan.

This plan focuses on external communications (i.e., communications between TrustEE and external target audiences such as industrial EE and RE project developers as described below). AEE INTEC (project

¹ Note: TrustEE does not support stand-alone, renewable energy generation-scale developments such as wind or solar parks/farms.

manager) will manage internal communications including meeting coordination, document sharing and other partner coordination tasks.

For each phase, this document outlines:

- Communication strategies and approach
- Audiences and target groups for communications
- Dissemination activities and channels
- Desired results (key performance indicators)
- Partner roles and responsibilities for carrying out described activities.

Borg & Co with ecee as a linked third party is responsible for development and management of this plan, with input and support from AEE INTEC and Consortium partners.

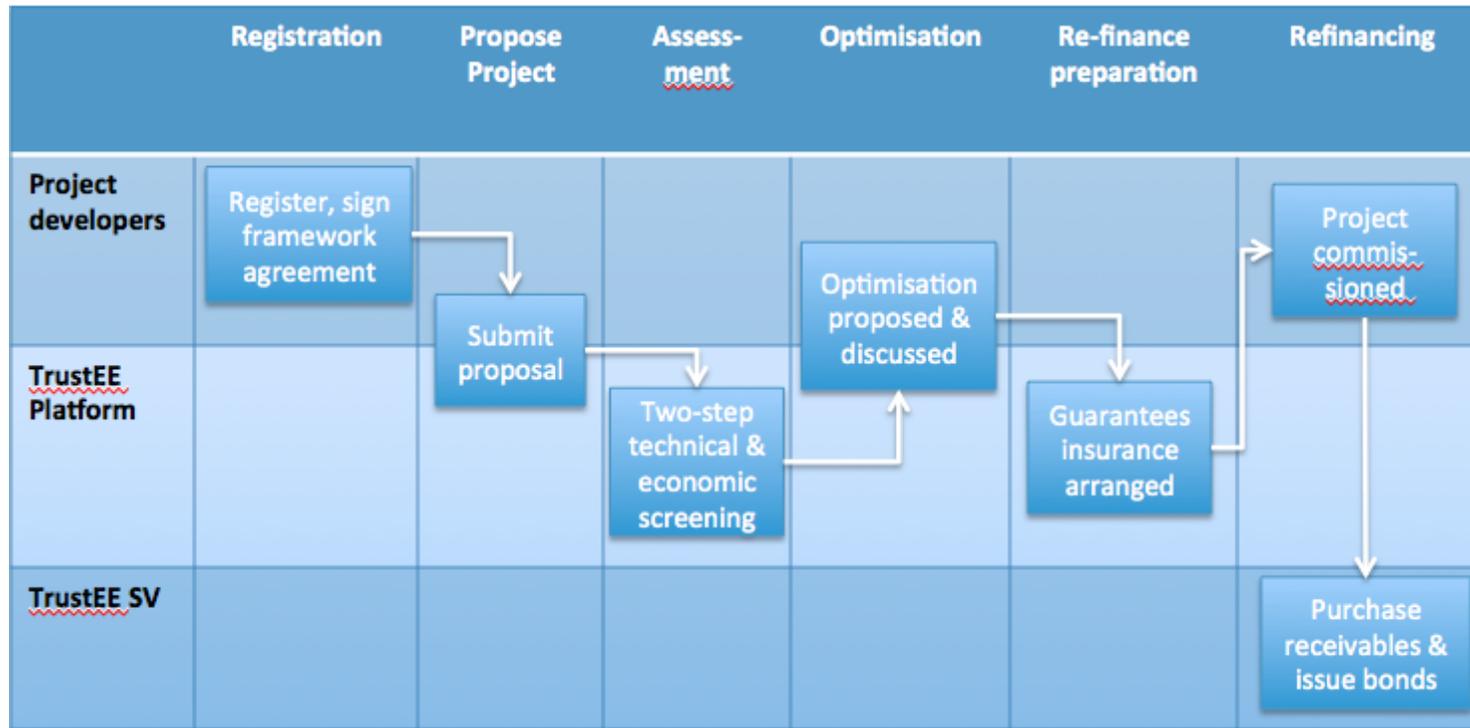
4 Overall project approach

As of the date of this report (through the mid-point of the project), TrustEE refined its overall project approach. Partners will pursue industrial project development and financing using a three-step process, which involves use of the TrustEE Platform and financing mechanism (Securitisation Vehicle):

- 1. Assessment (TrustEE Platform)**
 - a. Technical benchmarking versus state-of-the-art EE or RE technology/systems
 - b. Financial assessment based upon financial risk/return requirements
- 2. Development (TrustEE Platform)**
 - a. Technical optimisation
 - b. Contractual structuring
 - c. Risk-reducing insurance solutions
- 3. Financing/refinancing (Securitisation Vehicle)**
 - a. Projects meeting investment profile offered refinancing after successful installation and start-up
 - b. Refinancing vehicle is Securitisation Vehicle, established in Luxembourg, which purchases supplier's receivables, converts them to bonds and sells them to investors

Figure 1 outlines the basic steps foreseen in the process.

Figure 1: TrustEE project assessment, development and financing process



We further organise the project into two main work phases, as summarised below.

Phase 1. Engage investor community to determine type of financing mechanism, and potential for future investment; Establish legal foundations and secure necessary guarantees for TrustEE financing vehicle; develop and test the TrustEE Platform for assessing and developing projects; engage with known technology suppliers to discuss collaboration and identify potential reference projects; identify new suppliers or other project developers for future engagement once the financing vehicle and Platform and operating;

Phase 2. Broaden engagement with technology suppliers and other project developers to form a project developer network² (suppliers, industrial owners, service providers, etc); market TrustEE Platform and Securitisation Vehicle to project developers and investors in order to acquire reference projects; develop and disseminate digital and print content to promote project and successes; develop transition plan for project after project conclusion.

Energy efficiency and renewable energy technology suppliers and project developers are essential collaboration partners throughout the project to realise the project goals. Therefore, this audience is a priority for communication and dissemination activities.

Securing investment in the Securitisation Vehicle will also be a priority; therefore, the investor audience is a key stakeholder group for the consortium in particular during Phase 2 of the project.

5 Phase 1 objectives, strategies & activities

The communication and dissemination objectives in this phase are to: 1) establish TrustEE website, marketing look-and-feel, and primary dissemination channels, 2) establish contact with a group of credible project developers in Europe (e.g., technology suppliers, manufacturers, industrial owners, etc.), 3) work with project developers to form a supplier/provider network and identify potential reference projects for the Platform and financing (Securitisation Vehicle or SV), 4) arrange the necessary guarantees with the European Investment Fund and other insurance mechanisms in support of the financing mechanism (SV), 5) identify potential investors for the Securitisation Vehicle, 6) disseminate project goals and key findings via conferences, press releases, publications, website, social media and other channels.

5.1 Establish TrustEE website, profile (look-and-feel), and initial channels

Partners will establish the TrustEE website, a common look-and-feel for digital and print media, and initial set of channels to promote the project and disseminate results. The following media and tools will be developed during Phase 1:

TrustEE website: Established and launched at www.trust-ee.eu. Will serve as primary digital presence for project. The TrustEE Platform will be hosted separately.

² This was originally called a "Supplier Pool" but has been broadened to include other types of project developers.

Project profile (consistent look-and-feel): TrustEE will establish a profile across digital marketing and print products. The design and products will be oriented to a professional, business audience, keeping in mind the key audiences: industrial project developers, financiers and industrial decision-makers (financial, owners, etc). Beyond the website, products will include a design template (web), brochure, poster, Roll-up (conferences), and templates for letters (Word) and presentations (ppt, pdf).

Primary channels for communication and dissemination activities in this phase include the TrustEE website, eceee Summer Study and Industrial Conferences, and partner specific channels (e.g., eceee newsletters, partner newsletters, partner social media accounts, etc.)

5.2 Engage project developers & develop network (supplier pool)

Several TrustEE partners already have well-established relationships and networks of project developers/suppliers. Therefore, the first step is for these partners to contact and engage with these known suppliers. As these firms have established customers and marketing organisations/platforms, TrustEE partners anticipate that this approach will be an effective means to identify and develop promising reference projects in need of TrustEE support and financing.

Consortium partners shall contact project developers, providing them a standard letter that explains the TrustEE project goals and complimentary services for project developers. The letter will encourage developers to contact us (AEE INTEC as the primary point of contact), and to propose energy efficiency and renewable energy projects.

The goal for this phase is to contact 40 or more developers/suppliers of industrial EE and RE technologies and solutions about TrustEE, and the project development and underwriting services offered.

In parallel, TrustEE partners will develop performance criteria (e.g., level of experience, number of projects, use of performance guarantees, etc.) to differentiate experienced and reliable project developers. TrustEE partners will screen interested developers and, if the firms meet the criteria, publicly identify these firms as approved TrustEE suppliers on the TrustEE website³.

TrustEE partners will also identify new suppliers and organisations for future outreach, once the Platform and financing mechanism are in place.

5.3 Identify reference projects for development

TrustEE partners will solicit project proposals from the network of project developers. After amassing project proposals, TrustEE partners would analyse them for technical feasibility. If the proposals appear promising, TrustEE partners would explore options to support project development (see service offerings below).

³ www.trust-ee.eu

If proposals were not forthcoming, TrustEE partners would re-assess and likely expand the search for projects.

5.4 Identify and pursue guarantees for financing vehicle

Once the legal foundations for the financing mechanism (Securitisation Vehicle or SV) are established, engagement with the European Investment Fund (EIF) is critical to secure the necessary guarantees. Other, private and public insurance providers will also be contacted regarding opportunities to bolster the credit of the industrial end-users (owners) as necessary for underwriting.

5.5 Initiate financial partner (bank) and investor outreach

Communication and outreach will commence in this phase with select banks and investors. The primary goal of this outreach is to identify an initial financial partner. Additional objectives include building awareness of the TrustEE project and receiving input on the interest and potential for future financing. Once the legal foundations for the SV and Platform are in place, there is a portfolio of reference projects in the development pipeline, and an initial financial partner (bank) then focused outreach with investors will be a priority.

5.6 Communication and dissemination strategies, audiences, activities and roles

Strategy	Audience(s)	Messaging	Channels	Tasks and Role(s)
Identify and contact industrial RE and EE project developers, and solicit project proposals	Industrial focused service providers and project developers with a focus on providing RE and EE solutions for existing process heating operations in Europe. Includes biomass, biogas, solar thermal, heat recovery, and other EE providers. Target list available as internal-only document.	Create standard letter targeting project developers with value-based messaging. Content includes: what TrustEE offers for project developers, how we benefit them, and how to contact us. Format is letter (pdf) for electronic and/or print distribution, and a 1-page TrustEE overview hand-out for conferences.	<ul style="list-style-type: none"> • Direct partner communications channels (telephone, in-person, e-mail, social media accounts including Twitter, Linked-In) • TrustEE website www.trust-ee.eu (launch expected July 2016) • eceee Industrial Efficiency conference, Sept 2016 • Alpbach Financial Conference, October 2017 • Print media: Brochure, poster, Roll-up 	<ul style="list-style-type: none"> • Identify and document suppliers (All partners) • Develop and distribute letter to project developer network (All partners) • Maintain project developer list, track contacts and responses (AEE INTEC) • Updated supplier contact information periodically (All partners) • Develop website and 1-page overview hand-out (eceee) • Attend conferences and market services (All partners)
Create initial TrustEE project portfolio, line up guarantees/financing	<ol style="list-style-type: none"> 1. Industrial project developers (project identification) 2. Public/private entities offering guarantees; investors/financing 	<ol style="list-style-type: none"> 1. Same as above for project developers: In addition, create template for communicating Yes/No responses 2. Line up guarantees, and financing: TrustEE 1-page hand-out as 	<ol style="list-style-type: none"> 1. Developers: Partner channels (see above) 2. Guarantees and financing: REENAG stakeholder and partner 	<ul style="list-style-type: none"> • Technical assessment of projects (AEE, Fraunhofer, AINIA) • Develop Yes/No correspondence (Borg & Co) • Outreach, securing guarantees, financing

Strategy	Audience(s)	Messaging	Channels	Tasks and Role(s)
	organisations (enhanced guarantees, viable financing)	basis, supplement as needed	network (targeted communications)	options (REENAG)
Create and promote “approved” developer network	Industrial focused service providers (see above)	Core, value-based messaging focused on the complimentary services TrustEE offers, emphasising additional benefits of registering with TrustEE. Such benefits may include expedited processing time, marketing support	Use partner direct channels to identify and attract developers. TrustEE website: Communicate opportunity to developers, identify “preferred” developers	<ul style="list-style-type: none"> • Develop “approved” supplier performance criteria (AEE, Fraunhofer, AINIA, REENAG) • Promote “preferred” suppliers through website, news and other established channels (AEE INTEC, Borg & Co)
Develop TrustEE Platform to streamline project assessment and development	<ol style="list-style-type: none"> 1. Industrial focused service providers (see above). 2. Industrial end users/owners (especially SMEs) of operations and processes with significant thermal energy loads. Include e.g., breweries 	<p>To be determined.</p> <p>Suppliers: Anticipate messaging about value-added services of electronic platform.</p> <p>Industrial end users: Develop value based content</p>	<p>Developers: Same channels as above</p> <p>Industrial end-users: Same channels as suppliers, plus identify additional channels such as industrial energy manager/sustainability conferences</p>	<ul style="list-style-type: none"> • Define functionality and specification for platform (AEE, Fraunhofer, REENAG, AINIA) • Develop platform (Fraunhofer ISE)

5.7 Evaluation questions

During Phase 1, TrustEE partners will seek to answer the following questions:

1. What specific type of financing or refinancing should TrustEE pursue and provide? What barriers should this financing approach address?
2. Are TrustEE services – including assessment and development through the Platform, and financing – sufficiently attractive to project developers to entice them to collaborate?
3. What value is created for project developers by establishing a TrustEE project developer network (“supplier pool”)?
4. What legal agreements, guarantees and insurance mechanisms are necessary to ensure that TrustEE can fulfil a financing role? Who are the key countries and organisations that provide such backing and guarantees?
5. What workflows and processes (e.g., project proposals, structuring, TrustEE service facilitation, project brokering) would, if streamlined/automated:
 - a. Significantly accelerate project development?
 - b. Allow for greater portfolio scale or project throughput?
 - c. Create added value for project participants?
6. Which suppliers, investors and other key target groups should be the focus for Phase 2 communication and dissemination?

6 Summary of Phase 1 progress

This section provides an update on progress made in Phase 1, and insights gained with respect to the evaluation questions in section 4.1.5. The Periodic Report provided to the EU Commission provides a full accounting of progress made on all aspects of the TrustEE project.

The TrustEE website is operational. A consistent project profile (design look-and-feel) has been developed and applied across all digital and print media products. These include the website, press releases, informational briefs and presentations, letter templates, and brochures and conference materials. Dissemination channels are active via partner e-newsletters and social media channels.

Partners participated in 19 conferences and workshops where TrustEE was presented or discussed. Over 50 TrustEE brochures were shared during the eeeee Summer Study 2017. Another highlight was the presentation of TrustEE at the Energy Efficiency Finance Market Place in Brussels in January '17 where 350 participants from the financial sector, energy service companies, project developers and public authorities.

Financing Energy Performance Contracts (payments linked to energy savings) are only financially sustainable for SMEs with third party financing. However, the credit lines available to SME suppliers cannot cover the long cash conversion cycles of such schemes restricting their use to large projects. An innovative market based third-party financing scheme for SME-sponsored projects has to simplify contracts, eliminate risks and minimize transaction costs. A Securitisation Vehicle (SV) that purchases receivables from suppliers best meets these conditions; it does not “push” projects by financing them

from the start, but rather creates a “pull-effect” through a refinancing offer that will support SME-suppliers in getting better access to credit lines. Luxembourg offers the best investor protections with respect to securitisation vehicles; therefore, TrustEE will establish a SV based in Luxembourg.

The TrustEE Platform will arrange and provide servicing functions for the proposed financing structure, which can be characterized as a “Green Asset Backed Securities Scheme”. Development is on-going and it is expected that the Platform will be launched in 2018. Communications will reflect the launch in Phase 2.

Over 40 technical suppliers, primarily known suppliers within the partner networks, were contacted during Phase 1. Initial feedback from suppliers is that there is value in collaborating with TrustEE. In particular, suppliers were enthusiastic about the creation of a forfaiting fund that allows them to offer flexible payment plans to industrial customers (where payments are not contractually tied to savings). However, the level of collaboration and interest in registering as a TrustEE provider (supplier pool) remains an open question. The Platform must be operational before project developers can register. Partners will continue outreach with suppliers on the advantages of the Platform and SV, and pursue development of the TrustEE provider network (supplier pool) in Phase 2.

Partners contacted seventeen banks and financial institutions, including Kommunalkredit Austria, BNP Paribas Fortis, several insurance firms (Munich Re, Hanover RE) to discuss financing of EE/RE projects and financial investment approaches. Credit insurance packages are available, and at least several firms are interested in continuing discussions regarding TrustEE’s risk mitigation approach. Partners continue to pursue a guarantee by the European Investment Fund, which is necessary to ensure effective operation of the Securitisation Vehicle. Discussions with these institutions will continue through Phase 2.

7 Phase 2 objectives, strategies & activities

Phase 2 communication and dissemination objectives are designed to support the project direction as described in Section 4. Dissemination and communications will focus primarily on project acquisition and building the project pipeline. The phase 2 objectives are described below, followed by specific communication strategies, channels, activities and partner roles.

7.1 Acquire reference projects through on-going and expanded outreach

A primary goal for Phase 2 is to work with project developers and suppliers to identify and develop between 10-20 reference projects by January 2019. By the conclusion of the project, our aim is to work with suppliers to process this volume of reference projects via the Platform. We anticipated that the projects would be in various stages of development in the Platform for eventual consideration and financing via the SV.

Acquisition will involve regular and on-going engagement with the known suppliers and developers contacted in Phase 1. In addition, partners will expand outreach efforts by engaging with industrial trade organisations in Germany, Spain, Portugal, Austria, and Sweden. These institutions will be contacted about TrustEE’s offer, with the goal to identify 5-10 additional suppliers in each country for follow-up.

7.2 Realise project developer network (supplier pool)

The goal is to register 10 or more developers/suppliers of industrial EE and RE technologies and solutions in the TrustEE project developer network (supplier pool).

Upon signing framework agreements with TrustEE, these project developers will be marketed via the TrustEE website and other channels.

Communication content will focus on the value proposition of the forfaiting fund, and enabling suppliers to offer flexible payment plans to customers (that are not contractual tied to achieved energy savings).

7.3 Secure financial partner and guarantees for reference projects

Partners will continue engagement with financial institutions and investors. The primary focus is to identify an initial financial partner and then additional investors in an effort to reach €10 million in funding commitments. A volume of €10 million will enable the EIF to offer a guarantee, which is necessary for the TrustEE securitisation vehicle.

The Albacher Financial Symposium and EFIG discussions are key forums to reach investors. At Albacher, TrustEE partners hosted a workshop and presented the business model to an audience of approximately 25 investors and developers. In addition, partners staffed a TrustEE table (Roll-up, poster on display) and distributed 100 brochures to conference attendees (pdf available at <https://www.trust-ee.eu/library-reports>).

Partners (Reenag) contacted and will continue to engage banks and financial institutions to identify a financial partner. Over seventeen banks and financial institutions have been contacted to date, including Kommunalkredit Austria, BNP Paribas Fortis, and several insurance firms (Munich Re, Hanover RE). Discussions will centre on financing of EE/RE projects, risk mitigation strategies and ambition to offer 5-8% internal rate of return to investors over inflation.

Partners shall continue to pursue a guarantee by the European Investment Fund, which is necessary to ensure effective operation of the Securitisation Vehicle. Focused meetings will be pursued to obtain this guarantee.

7.4 Create lasting presence

Partners intend to discuss and develop a transition plan after the three-year Horizon 2020 project concludes.

In anticipation, partners will work to establish a lasting project presence. This includes maintaining the project website for a defined period of time after January 2019, and developing and placing content to create lasting project imprint. These will include publications, conference proceedings, YouTube videos, LI SlideShare, etc. Points of contact and roles post-project must be defined as part of the transition plan.

7.5 Communication and dissemination strategies, audiences, activities and partner roles

Strategy	Audience(s)	Messaging and content	Channels	Tasks and Role(s)
Identify and acquire projects through regular and on-going engagement with known suppliers (TrustEE pool)	Known, priority industrial project developers and suppliers in Germany, Austria, Portugal, Spain, Sweden	<ul style="list-style-type: none"> • Flexible payment options, scaling SME businesses, and volume-building opportunity • Project optimisation and benchmarking • Complementary services for a brief time 	<ul style="list-style-type: none"> • Partner specific relationships and channels • TrustEE website to promote registered providers (network) • ecee Industrial Conference 2018 • National-level workshops/events 	<ul style="list-style-type: none"> • Regular (at least monthly) outreach (All partners) • Send updated outreach letter and presentation (All) • Encourage registration via the Platform • Market TrustEE preferred providers on website and news feeds (Borg & Co) • Reward system for suppliers with approved projects, financed projects, etc (Borg & Co + All)
Broaden outreach and project acquisition opportunities by targeting industrial trade associations in select countries	<p>National or EU-level industry trade associations and branch organisations e.g., renewable energy associations, energy efficiency assoc., sector-specific promotional organisations, industrial energy services, etc.</p> <p>Partners should prioritise five (5) such organisations</p>	<ul style="list-style-type: none"> • New financing opportunity for members • Value-added for introducing new resources to members • See above for value to individual suppliers 	<ul style="list-style-type: none"> • Print and digital formats • Targeted letter, and concise introduction (ppt) • TrustEE website • Email/phone to engage and verify correct contact person • In-person meetings with interested association representatives and 	<ul style="list-style-type: none"> • Identify and document target suppliers (All partners) • Develop and distribute letter and intro presentation to project developer network (All partners) • Follow-up and meet with contacts to discuss projects • Identify interested suppliers, follow-up, track responses (All partners) • Maintain updated project

Strategy	Audience(s)	Messaging and content	Channels	Tasks and Role(s)
	in countries of focus: Austria, Spain, Germany, Portugal and Sweden		suppliers <ul style="list-style-type: none"> eceee Industrial Conference 2018 National-level workshops (as needed) 	developer list, track follow-up centrally (Borg & Co) <ul style="list-style-type: none"> Invite representatives to relevant events and conferences e.g., eceee Industrial Conference 2018, national-level events (All partners)
Secure funding and guarantees for project financing and operation of SV (goal is €10 million)	Banks Financial institutions and investors European Investment Fund (guarantee) Private insurance firms	<ul style="list-style-type: none"> Expected return on investment, timeframe “Green” investment option Risk mitigation approach and handling TrustEE Platform 	<ul style="list-style-type: none"> Alpbach Symposium 2017 Reenag contacts and channels TrustEE website Financing/investment forums and conferences (e.g., EEFIG) eceee Industrial Conference 2018 	<ul style="list-style-type: none"> Acquire guarantee from Euro Investment Fund (Reenag) Solicit investment in SV (Reenag) Promote project at financial conferences/events (Reenag + partners) Content development (Reenag + Borg & Co)
Disseminate project approach and results; Create lasting project impression	All target audiences (suppliers, investors, industrial end-users) plus broader industrial stakeholder groups, EU policy makers, EE and RE	<ul style="list-style-type: none"> TrustEE business model, approach and value of TrustEE Flexible payment options, scaling SME businesses, and volume-building opportunities 	<ul style="list-style-type: none"> Print and digital formats Videos (YouTube) describing business model, partner testimonials TrustEE website Content placement in 	<ul style="list-style-type: none"> Broad dissemination efforts through all project and partner channels (All partners + Borg & Co) Host workshop on industrial financing and be project exhibitor at eceee Industrial Conference

Strategy	Audience(s)	Messaging and content	Channels	Tasks and Role(s)
	consultants, etc.	<ul style="list-style-type: none"> • Project optimisation and benchmarking • Results, case studies and lessons learned 	<p>lasting channels: publications, conference proceedings, Linked-In publications/presentations, case studies, SlideShare, etc</p> <ul style="list-style-type: none"> • Final project conference 	<ul style="list-style-type: none"> • Plan and implement final TrustEE workshop (Borg & Co with all partners) • Create and place content in lasting channels such as Linked In Slideshare, conference proceedings and publications (Borg & Co) • Maintain project website (Borg & Co) • Create video on project (Borg & Co, AEE, Reenag)

8 Communication terms & media description

The communication media used to support TrustEE project goals are outlined in this section.

Partner-direct channels: These include TrustEE partners' individual telephone accounts, in-person (local) meeting/conference rooms, e-mail accounts, social media accounts (e.g., Twitter, Linked In, Facebook), news feeds/newsletters, and individual partner websites. Partner organisations will link to and cite TrustEE project communications, news, and services as appropriate. For example, partners can provide links from appropriate partner webpages to the TrustEE website, and share TrustEE news and updates through their individual websites/social media accounts.

TrustEE website: A TrustEE project website was launched in July 2016 and is located at the URL www.trust-ee.eu. The website supports the communication goals and approach outlined in this plan. The design should convey solidity, tradition and modernity through the use of typography and embedded design features. The design – through features such as typography and font selection, colour scheme, spacing, and background – is intended to enhance credibility with and attract project developers. Borg & Co is responsible for content and website updates (with input from partners).

TrustEE Platform: This web-enabled platform will be a semi-automated platform for a standardized technical and economic project evaluation. It will be launched in Phase 2. The lead partner to design and manage this platform is F-ISE with input from AEE INTEC, ANIA and UEVORA. Borg & Co is responsible for working with F-ISE to providers users with clear links between the TrustEE website and Platform, and to apply consistent design elements in the Platform.

The TrustEE provider network (technology providers or the industrial companies) will register and enter the technical and economic data for a planned energy efficiency or renewable energy project. Projects will undergo a three-stage evaluation. At levels 1 and 2, an automatic technical and economic evaluation of the parameters of the planned project will be carried out. The technical evaluation (plausibility of the measures, expected returns, etc.) will be done using an automated background simulation. If the project fulfils the criteria, a technical optimization will be developed in step 3 (if necessary) with the TrustEE Manager, and thus legal and insurance-related preparations for re-financing will be made.

TrustEE news and press releases: TrustEE will produce news items in conjunction with key milestones of the project, including: project launch, soliciting project ideas, appearances/meetings of TrustEE partners at conferences/events, Platform and SV launch, successful project development, etc. TrustEE news will be communicated via the website, eceee newsletter, and through partner-direct channels including social media.

TrustEE events/meetings: TrustEE partners will develop and participate in workshops, conferences and other activities over the course of the project. During phase 1, it is anticipated that TrustEE partners will primarily engage with project developers in one-on-one or several-on-one group meetings locally (e.g., in Vienna). eceee Summer Study and Industrial conferences will be a channel throughout the course of the project. The Alpbach Financial Symposium in 2017 is an important event to gain traction with financial stakeholders. EFIG events and workshops will also be leveraged to engage with target groups. National-level meetings e.g., with trade associations and individual suppliers will be coordinated by partners as appropriate.

Print media: Print media includes a one-page project handout, a brochure, a poster, and a Roll-up for use by partners to promote TrustEE at conference events and workshops. In addition a TrustEE introductory presentation is available via the TrustEE website and Linked-In SlideShare for download and printing.

Social and digital media: TrustEE will not establish project-specific social media accounts. Instead, TrustEE partners with established social media presence will share TrustEE news through these channels (e.g., Twitter, Facebook, Linked In etc.)

In phase 2, TrustEE partners may elect to form a project-focused group, such as a Linked-In group. In addition, Borg & Co will focus on content placement on sustaining digital media sites (e.g., Linked In presentations, Youtube) to create a lasting project impression.

Partners will develop a series of videos for YouTube describing the business model, partners and other themes.

Table 2 describes the types of channels and the extent to which TrustEE partners intend to rely upon such channels during each project phase.

Table 1: Media types and relative focus

Type	Phase 1 (years 1-2)	Phase 2 (year 3)
Partner channels: In-person meetings, e-mail, telephone, websites, social media	Yes – heavy focus	Yes – heavy focus
TrustEE website	Yes – moderate focus	Yes – heavy focus
Social and digital media (Twitter, Linked In, Facebook, etc)	No project accounts. Partners use own social media accounts (moderate focus)	Yes – moderate focus. Content placement on longer-lasting media (e.g., Linked In presentations, Youtube). Develop video series for YouTube.
TrustEE Platform (up-scaling)	No – development stage	Yes – heavy focus

	only	
Conferences/workshops	Yes – moderate focus	Yes – moderate focus
Print media	Yes – moderate	Yes – moderate

9 Summary of desired results and outcomes

This section outlines desired results and outcomes from the project.

Table 2: Desired results and outcomes

Desired outcome/result	Communication progress indicator
Establish TrustEE project profile and common look and feel	<p>Launch TrustEE website v 1.0 – Complete</p> <p>Develop consistent brand elements and templates for print and digital media products (e.g., brochure, poster, letterhead, etc) – Complete</p> <p>Present and promote at conferences/workshops (ecee conferences, Alpbach, EEFIG, etc) – Ongoing</p> <p>Individual project partners link/reference TrustEE project through individual websites and/or social media accounts - Ongoing</p>
Develop TrustEE project developer (supplier) network	<p>Contact 40+ project developers with TrustEE letter – Complete</p> <p>Identify and send TrustEE letter and information (presentation) to at least 5 trade associations in member countries – To Do</p> <p>Follow-up and engage with interested suppliers – To Do</p> <p>Host conferences and workshop to engage with suppliers – Ongoing</p>

	Screen and register 10+ TrustEE approved developers on the Platform – To Do
Identify and develop reference projects	<p>Launch and market the Platform through TrustEE website and other channels – To Do</p> <p>Create video series to showcase business model, partners and value – To Do</p> <p>Identify 10-20 reference projects for development through the Platform and financing via the SV – To Do</p>
Line up necessary guarantees and project financing for reference projects	<p>EIF guarantee for SV – To Do</p> <p>Match each project with guarantees, insurance, etc as needed – To Do</p> <p>Host workshops and events to engage with financiers and investors - Ongoing</p> <p>Line up €10M in financing) – To Do</p>
Execute and refinance EE and RE projects	<p>Purchase receivables and sell bonds to investors once EIF guarantee is in place – To Do</p> <p>Develop case studies of successful projects and market them on TrustEE website and long-lasting media channels – To Do</p>