D6.1

Dissemination and Communication Strategy and Plan

WP6

SMAR**Tee**STOR**Y**

Project Acronym	SMARTeeSTORY
Project Title	Integrated, interoperable, smart and user-centred building automation and control system for better energy performance of non-residential historic buildings coupling physics & data-based approaches
Project Duration	1/5/2023 – 1/5/2027 (48 Months)
GA Number	101103956

Work Package	WP6 – DEC, Replication, Training and Certification
Associated Task	Task 6.1 Dissemination and Communication Strategy
Deliverable Lead Partner	STEINBEIS
Contributors	All
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List of Abbreviations and Acronyms

Acronym	Description
CI	Corporate Identity
CINEA	European Climate, Infrastructure and Environment Executive Agency
D	Deliverable
D&C	Dissemination & Communication
D&C Strategy	Dissemination & Communication Strategy & Plan
EC	European Commission
EPC	Energy Performance Certificates
ESCO	Energy Service Company
EU	European Union
HVAC	Heating, Ventilation and Air Conditioning
KPI	Key Performance Indicator
M	Month
NGO	Non-Governmental Organisation
RTO	Research and Technology Organisation
SME	Small and Medium Sized Enterprise
SRI	Smart Readiness Indicator
WP	Work Package

Executive Summary

The SMARTeeSTORY "Dissemination & Communication Strategy and Plan" (D&C Strategy) aims to set a clear path to ensure and enhance the impact of the project by defining activities and measures to be conducted both during and after the project. It provides an overview of all dissemination and communication (D&C) activities as well as training activities taking place and foreseen within work package (WP) 6 "DEC, Replication, Training and Certification". It describes the roles and the responsibilities of all partners, as well as the expected outcomes and results.

D&C activities serve as a transversal support to each WP and partner of the SMARTeeSTORY project. The communication activities are there to inform about the project and the dissemination activities to describe and make results available for use and further uptake.

The D&C Strategy will be updated when needed (at most once a year) to include any necessary changes to the plan following latest developments. Updates on the progress of the planned D&C activities will be included in deliverables D6.2., the "Report on dissemination, communication and training activities" (M24) and D6.6. "Report on dissemination, communication and training activities (rev1)" (M48).

Chapter 1 gives an overview about the main target group as well as the purpose of this deliverable, partner's contributions, and relations to other activities within the project. Chapter 2 provides an overview of the relevant stakeholders of the project. Chapter 3 comprises the main part of this deliverable, the D&C Strategy. It provides an overview of what D&C means, how D&C works within the project, what the key messages of the project are, how impact will be assessed and why it is important to refer to EU funding in all outputs. Moreover, it describes the corporate identity of the project and provides a comprehensive overview of all planned D&C materials, activities, and channels. Chapter 4 concludes the deliverable.

1. Introduction

This deliverable aims to ensure and enhance the impact and visibility of the project by defining activities and measures, including responsible partners and planned timelines, to be conducted both during and after the project.

Overall ambition and main objectives of SMARTeeSTORY

The main objective of SMARTeeSTORY is the "smartification" of historical buildings in Europe. To achieve this, an integrated building automation and control system for monitoring and optimizing building energy performance according to an innovative multi-domain approach will be developed to improve the energy efficiency of these buildings. Despite the increasing availability of affordable smart technologies, the responsiveness and intelligence of historical buildings are still in their early stages. The project therefore targets commercial historic buildings and promotes solutions that effectively combine energy efficiency, renewable energy sources, and digital and smart technologies to support the digital transformation of the building stock towards carbon neutrality.

SMARTeeSTORY aims to achieve the following main objectives:

o   Establish a framework for the digitalisation of historic buildings, coupling preservation and adaptation to current prerequisites of energy efficiency (WP1)

o   Develop novel user-centred interaction strategies between occupants and smart buildings (WP2)

o   Develop accurate models for forecasting short and long-term building energy performance, combining physics and data-based approaches (WP3)

o   Couple digital smart hardware infrastructure with an interoperable software solution provided with advanced energy services for assessment, optimization, and control of smart historic buildings to enhance overall building performance and Smart Readiness Indicators (SRI) (WP4)

o   Demonstrate the proposed digital solutions in three real-life demonstration sites located in different climatic regions and where energy renovation is not an option (WP5)

o   Maximise impact-creation potential of the project by outreach to stakeholders and enabling the exploitation and replication of SMARTeeSTORY results, creating policy recommendations for improving SRI assessment and new certification schemes in synergy with ongoing European initiatives (WP6)

Role of D&C to reach these objectives

The activities performed around D&C in WP6 aim to increase the impact of all results developed in SMARTeeSTORY. In line with the objectives defined above, coordinated communication and dissemination activities in various digital and non-digital forms will be carried out. The project will be promoted by informing the wider public, especially the building's users, about the project's impacts and benefits (communication activities) while at the same time making results available for use to more scientific and technical audience types (dissemination activities).

The D&C activities further set the ground for subsequent training, replication, and exploitation activities such as market analysis, business modelling and development of an Intellectual Property Rights strategy, to facilitate uptake of results.

The following Gantt-chart provides an overview of all planned dissemination, communication and training activities, including deliverables, partners, and a rough timeline.
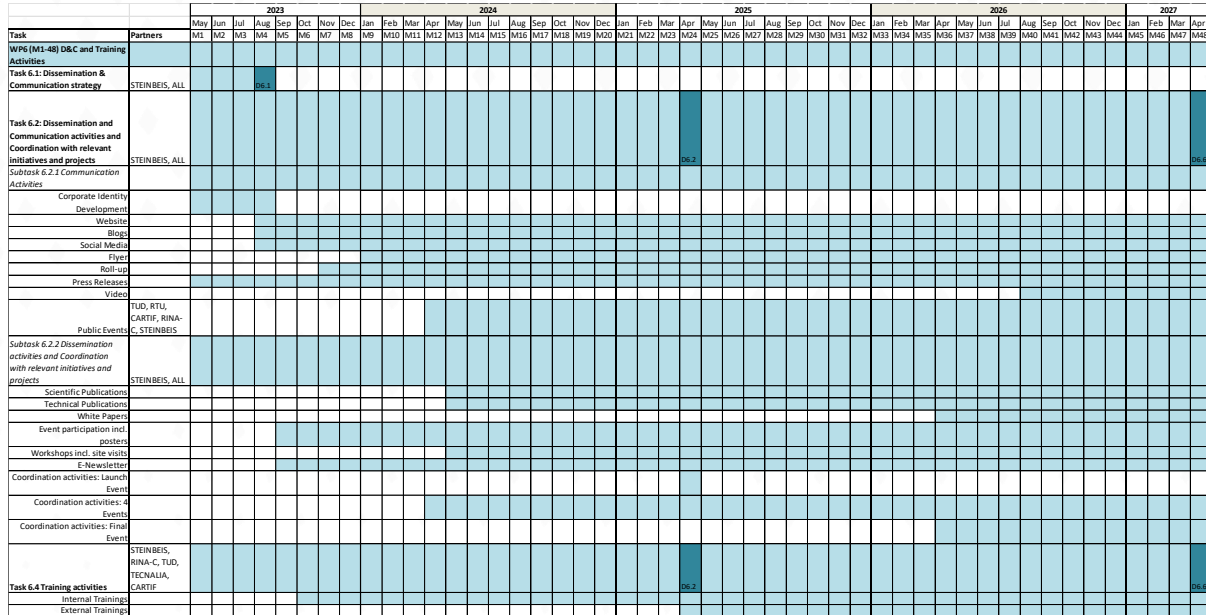
Figure 1: Gantt-chart of D&C activities in SMARTeeSTORY

1.1 Target Group and Purpose

The target group of D6.1 is threefold:

1)   First, the **SMARTeeSTORY project partners** need to be informed about the planned D&C activities, about how to communicate and disseminate the project themselves and what needs to be considered while doing so (for example, use of Corporate Identity (CI), reference to EU funding).

2)   Second, D6.1 informs the **European Commission (EC)** and/or the European Climate, Infrastructure and Environment Executive Agency (CINEA) about the planned D&C activities as well as expected KPIs within the project.

3)   Third, the D&C Strategy informs **interested stakeholders** and the public about the planned activities and will thus be uploaded to the website for easy access.

The **purpose** of the D&C Strategy is to serve as a source of information regarding all planned D&C activities, as well as a guideline on **what** is expected from **which** partners, **when** it is expected, what is the **aim** of the respective activities, and how activities will be **monitored** (e.g., KPIs). Furthermore, it provides the partners with an understanding of why D&C activities are relevant, who the main target groups are and how the activities will be carried out.

1.2   Contributions of Partners

STEINBEIS as leader of WP6 was responsible for the general development of this deliverable and is continuously responsible for the successful implementation of its described strategies and activities regarding D&C.

RINA-C as project coordinator was closely involved in the development of the project CI and in setting up the main elements of the D&C activities. Moreover, RINA-C reviewed this deliverable as part of quality management.

All other partners were actively involved by contributing to the stakeholder mapping activity described in Chapter 2.

The following table (Table 1) shows the main contributions from project partners in the development of the current deliverable.

Table 1: Contributions of partners

Partner short name	Contributions
STEINBEIS	Writing of D6.1
RINA-C	Overall support with D&C activities, review of D6.1
All partners	Input on stakeholders and target groups relevant to their organisations

1.3   Relation to other activities in the project

The D&C activities of SMARTeeSTORY are strongly related to all WPs, as they promote the project activities, results and developments and focus on their further exploitation. Thus, strong linkages to all project activities, all partners and throughout the entire project constitute a powerful network.

This close involvement of all partners guarantees a successful flow of information within the project as well as a wide spread of SMARTeeSTORY outcomes. To ensure this, a dedicated D&C Team has been established, which consists of one D&C representative per project partner. The D&C Team members participate in regular D&C Team meetings (as part of monthly WP6 meetings) to communicate their organisations or WP needs, providing updates about publishable activities as well as concrete inputs for the website, social media, news articles, etc. to STEINBEIS.

2. Stakeholder Mapping

To identify the key stakeholders of SMARTeeSTORY, an interactive stakeholder mapping workshop took place in M2, led by STEINBEIS and with representatives from all partner organisations. Via an online collaboration tool, the partners brainstormed, discussed, identified, and grouped potential stakeholder, as well as relevant newsletters and events.

As a result of this workshop, a table has been generated with an initial 126 stakeholders. This table is available to all partners via the SMARTeeSTORY SharePoint and will be regularly updated with new stakeholders as they are identified throughout the project. The goal is to have 200 relevant stakeholders identified by the end of the project.

The stakeholder mapping table contains the following information with respect to these target groups:

- o **Stakeholder information** (including name of the organisation, organisation type, geographical level).
- o **Level of engagement** required (e.g., distinction between "keep satisfied" vs. "actively engage").
- o **Tasks & timing** (which aspects of the project are relevant to this stakeholder?).
- o **Partner information** (who has direct links to this stakeholder?).

As part of the workshop, the following target groups have thus been identified:

- o **Civil Society**: potential (building) end-users/consumers, citizens, press/public media.
- o **Industry & Research**: academia/researchers, industrial groups, ESCOs, SMEs and large technology providers.
- o **Related networks, initiatives & policy makers**: (relevant) project/ initiatives/ communities /networks and platforms, associations interested in historic buildings or cultural heritage and/or smartification of buildings, policy makers, public authorities.
- o **Investors and other stakeholders.**

Table 2 is a simplified version of the list of identified stakeholder information, providing an overview of the respective stakeholders, providing examples to explain who the representatives of these target groups are, and, depending on the level of influence and interest of the target group, the level of engagement required from the project and consortium.

Table 2: SMARTeeSTORY stakeholder mapping

Target Group	Examples	Engagement Level
SMARTeeSTORY project partners	Consortium members	Actively engage Keep (each other) informed
Potential end-users, consumers, citizens	People in the historic buildings (employees, students, visitors), historic buildings owners, concessionaires, facility asset and operational managers, real estates,	Actively engage Monitor Keep informed
Press, public media	Local, national, and international public media journals, printed and digital journals	Keep informed

Academia, researchers	e.g., University of Genoa, TNO, VITO, ENEA, NTUA, University of Aegean, CERTH	Actively engage Keep informed
Industrial groups	Interested in relevant smart products and services for buildings digitalisation, data scientists, AI experts, systems integrators, e.g., REHVA, IFMA, CEE	Keep satisfied Actively engage Monitor Keep informed
ESCOs	e.g., VEOLIA	Actively engage
SMEs and large technology providers	Focusing on IoT, ICT, BMS, edge computing, e.g., Permasteelisa, Focchi Aluminium construction, Alumeshet, AZAm Scheldebouw, Gualini, Hydro, Wicona, Schueco	Actively engage Monitor
(Relevant) projects and initiatives, communities, networks, platforms	e.g., Energy Management Network of the Andalusian Regional Government, energy communities, ECTP, BuildON, Built4People, AutoDAN, DigiBUILD, BPIE	Actively engage Keep informed
Associations	e.g., Smart buildings alliance, Fondo Ambiente Italiano, Association des Residences Royales Européenne, IEA, ENEA, professional association on building controls, facade technologies, HVAC, lighting, European association on solar shadings, office building association, national energy associations,	Actively engage Keep informed
Policy makers	e.g., EN & ISO Standard committee, SRI regulation developers, European Environment Agency CINEA	Keep satisfied Actively engage Keep informed
Public authorities	National ministries for energy transition, local politicians	Actively engage Keep informed
Potential investors	e.g., private investors, financial institutes	Keep informed

3. Dissemination and Communication Strategy and Plan

3.1. Dissemination vs. Communication: Definitions

When using the terms *dissemination* and *communication*, a joint understanding of these concepts needs to be ensured. SMARTeeSTORY uses the definitions elaborated in the following.

3.1.1. Communication Activities

The EC defines *communication* of a project as

> **"…a strategically planned process that starts at the outset of the action and continues throughout its entire lifetime, aimed at promoting the action and its results. It requires strategic and targeted measures for communicating about (i) the action and (ii) its results to a multitude of audiences, including the media and the public…"[1]**

Communication is understood as spreading **general information** about the project and its results, such as current or planned project activities, with a focus on the project as a whole and its overall relevance for society at large.

Information should be communicated at an **early stage**, that is, as soon as it becomes available. Addressing all target groups via communication measures early on ensures that recent developments are swiftly shared with interested stakeholders.

The **target audience** of general communication activities is very broad. It targets the general public such as citizens, consumers, and potential building users. That is, target groups that are either directly affected by the project's measures or interested in the topic of the project. Communication activities also target more technical audience types who are specifically addressed via dissemination activities at a later stage, such as municipalities, industrial representatives, policy makers, researchers, etc. A particular focus also lies on the media and local stakeholders.

The **language level** of communication measures is easy to understand with very few to no specific technical or scientific terms so that it can be understood by all audience types.

To make the SMARTeeSTORY project and its results known, the SMARTeeSTORY communication activities pursue the following main **objectives** and expected **impacts**:

- o to **promote** SMARTeeSTORY and inform about its objectives, progress, first outcomes and final results,
- o to **raise interest** in the SMARTeeSTORY approach regarding the project's economic, environmental, and social benefits,
- o to **explain and inform** about the activities of SMARTeeSTORY's demonstrators,
- o to give **visibility** to SMARTeeSTORY, its **related projects** and the **EU** as initiator and supporter,
- o to **contribute** to cross-project communication and potential cooperation with other projects.

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[1] http://ec.europa.eu/research/participants/portal/desktop/en/support/reference_terms.html

Communication measures are considered **successful** if a significant number of people become aware of the challenges being addressed by SMARTeeSTORY and the corresponding developed solutions. Moreover, the communication measures aim to encourage people who may have had limited or no involvement with smart energy measures and/or the energy management of historic buildings to actively engage with the project (e.g., through the demonstrators and the respective historic buildings).

Information will be communicated in **written digital and printed** formats (websites, social media, newsletter, news & blog articles, press releases, flyers, etc.) but also **presented orally** at events or via videos. These are further elaborated in Chapter 3.7.

3.1.2. Dissemination Activities

Dissemination is understood as spreading information about **technical** and **scientific** project results for others to use throughout the project's lifetime and beyond.

Such specific information is disseminated **as soon as it becomes available in a publishable format**. Waiting for published technical results ensures that any sensitive technical information is shared at the appropriate time and only correct and well-researched information is shared.

The **target audience** of dissemination measures are scientific, technical, and professional audiences**,** including scientists, researchers, students, and technical representatives such as engineers or developers from industry, SMEs, start-ups, municipalities, investors, as well as policymakers at regional, national, and European levels. Rather than just being informed, the dissemination target audience is expected to further process the information, such as by taking up the results into their work or by further developing them. Also, this audience is invited to engage with the project, for instance, by participating in workshops or by providing feedback to publications.

The **language level** is rather specific and professional, making use of technical or scientific terms, and explaining in detail the resulting outcomes and achievements of the project to best encourage uptake of results.

To facilitate further development, replication, exploitation, and market uptake of the SMARTeeSTORY results, the project dissemination activities pursue the following main **objectives** and expected **impacts**:

- o **encourage collaboration** of all relevant stakeholders by establishing a two-way channel to gather and provide feedback from/to peers, experts, researchers, policymakers, and industry.
- o **ensure results are made available for and are picked up by the respective stakeholders**, raising their awareness of the research outcomes which are made available early on in the research stage.
- o **encourage exploitation of project results** in further historic buildings across Europe and worldwide.
- o **facilitate additional research and further developments** at universities, RTOs & research departments of the stakeholder community.
- o **support the continuation of the SMARTeeSTORY** result implementation after the end of

the project by **creating a strong base for future partnerships,** collaboration, and information exchange between relevant communities of stakeholders in the area of historic building smartification.

Dissemination measures are considered **successful** if the scientific outcomes of the project are taken up and further developed, thus directly contributing to reaching the expected impact of the project, supporting the successful exploitation and market deployment of the project results.

Different **tools** will be used to reach a professional target audience and to inform them about the results and the replication potential of SMARTeeSTORY. These tools are further elaborated in Chapter 3.7.

3.2. D&C Cascade

Within SMARTeeSTORY, D&C activities take place at various levels and are carried out by different partners. Thus, different roles are required to ensure that adequate implementation of the D&C activities is achieved. The following chapters describe the different communication levels, roles, and responsibilities across the project partners as well as how communication between STEINBEIS as WP6 leader and the remaining SMARTeeSTORY partners is organised and linked.

3.2.1. Internal Communication Level: D&C Team

The SMARTeeSTORY D&C Team is an important means to ensure the communication flow between STEINBEIS as WP6 leader and the rest of the consortium. This team is responsible for updating each other on the latest developments within the WPs and demonstrators, thus pursuing a multiplier effect.

Frequency

The D&C Team has been set up in M3. At the beginning, monthly meetings are planned, but once the communication flow has been successfully established, the online meetings will be held on a bi-monthly basis.

Members & Roles

The SMARTeeSTORY D&C Team consists of STEINBEIS, the leader, and at least one representative per partner organisation. More specifically:

o **STEINBEIS**: acts as the main project contact point for all interested press and media in the English language. It is responsible for the main project communication and provides the D&C Team members with the respective materials and texts. STEINBEIS manages the projects' main communication materials and channels such as the project website, e-newsletter, press releases or Social Media channels (X, LinkedIn).

o **RINA-C**: As coordinator and exploitation lead, RINA-C strongly supports STEINBEIS with the activities of the D&C Team as well as contributes to its contents as an active member. Vice versa, STEINBEIS strongly supports RINA-C in the external communication to related EU institutions, initiatives, projects, interested stakeholders and other multipliers as well as in supporting successful exploitation via dissemination means.

o **PARTNERS**: The D&C Team members (incl. WP leaders and representatives from the demonstrators) are responsible for providing regular input to the SMARTeeSTORY D&C Team and to thus provide STEINBEIS with information about their respective (local) activities and results, so that they can then be further promoted. Furthermore, the D&C Team members are responsible for promoting the project via their own local and national channels, e.g., distributing the project newsletter, translating, and distributing the press releases, disseminating project news via their organisation's websites, social media channels, etc.

Table 3: SMARTeeSTORY D&C team members

Partner short name	Full name	Role
RINA-C	RINA-C CONSULTING SPA	Project Coordinator WP4-Leader WP7-Leader Supporting Riga and Delft demonstrator
TECNALIA	FUNDACION TECNALIA RESEARCH & INNOVATION	WP3-Leader
TUD	TECHNISCHE UNIVERSITEIT DELFT	WP2-Leader Delft demonstrator
REA	RIGA MUNICIPAL AGENCY "RIGA ENERGY AGENCY"	Riga demonstrator
RTU	RIGAS TEHNISKA UNIVERSITATESPA	Supporting Riga demonstrator
Pellini	PELLINI SPA	Supporting Riga demonstrator
AAE	AGENCIA ANDALUZA DE LA ENERGIA	Supporting Riga, Delft, and Granada demonstrators
CUERVA	CUERVA ENERGIA SLU	Granada demonstrator
CARTIF	FUNDACION CARTIF	WP5-Leader Supporting Granada demonstrator
SE	SCHNEIDER ELECTRIC SPA	WP1-Leader Supporting Riga, Delft, and Granada demonstrator
EXUS	EXUS SOFTWARE MONOPROSOPI ETAIRIA PERIORISMENIS EVTHINIS	Supporting with data science and ICT competences
TERA	TERA SRL	Supporting Delft and Granada demonstrator
STEINBEIS	STEINBEIS INNOVATION GGMBH	WP6-Leader

The consortium thus follows a coordinated communication structure, the D&C cascade, to ensure the optimal flow of information among the project partners and the maximum outreach to local stakeholders and networks (Figure 2):
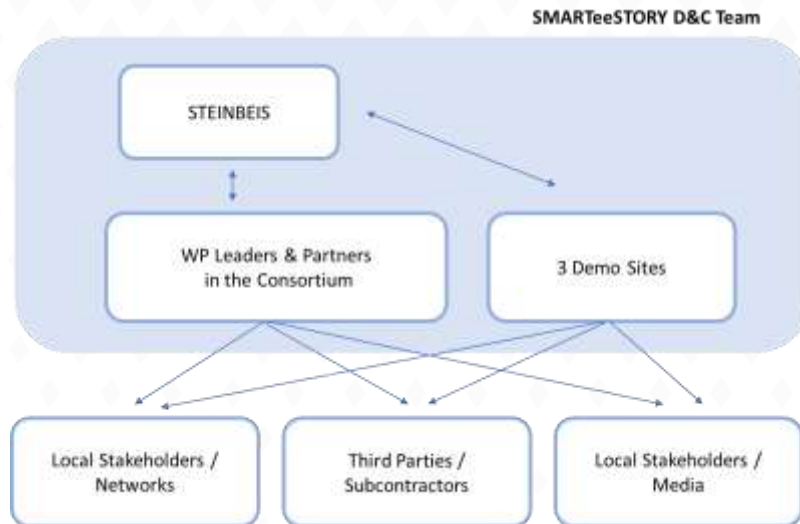
Figure 2: Illustration of the internal D&C cascade and the flow of information thereof

Input Collection

The collection of input for the different communication channels is supported by a list of activities stored on the joint file sharing platform provided by RINA-C for all team members to access (SharePoint). The list is managed by STEINBEIS and regularly filled with inputs by all members of the D&C Team. The list is reviewed jointly by all members as part of the regular D&C Team meetings.

3.2.2. External Communication Levels

The external SMARTeeSTORY D&C activities take place at various levels:

European/International Level

At this level, European and international stakeholders, initiatives, projects, etc. will be informed about SMARTeeSTORY by STEINBEIS as WP6 leader in English, e.g., via the project website, blog articles, newsletter, social media channels, but also through active event participation at international level. The global D&C activities will be organised jointly in cooperation with related projects and initiatives, as described in Subtask 6.2.2 "Dissemination activities and Coordination with relevant initiatives and projects" of the SMARTeeSTORY Grant Agreement[2]. Moreover, all project partners will participate in global D&C activities and events to increase the visibility of SMARTeeSTORY.

National, Regional, and Local Level

Interested stakeholders at a national level should be addressed in their local language. Therefore, D&C activities at national/regional/local level will be done by the national, regional, and local project partners. A selection of general project news, articles, and other information (depending on the local audience and their needs) can be translated and distributed by the project partners of

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[2] SMARTeeSTORY Grant Agreement (2023), Description of Action, WP 6

each country. Moreover, local partners have connections to local media and related networks which they can use for specific local SMARTeeSTORY dissemination and communication. The local D&C Team partners are thus fully responsible for regional/local communication but will be strongly supported by STEINBEIS where possible, e.g., in the form of bilateral calls or e-mails.

3.2.3. Advisory Board

At the beginning of the project, a dedicated Advisory Board has been set up, consisting of four members. This board will provide feedback and advice during the project. Its members will participate to selected meetings and provide comments and insights on specific implementation and exploitation issues.

The Advisory Board will be managed by RINA-C, as the project coordinator of SMARTeeSTORY.

3.3.   Key Messages

The target audience of the SMARTeeSTORY D&C activities can be divided into more dissemination-focused audiences, e.g., scientific, technical and investment audiences, and more communication-focused audiences, e.g., end-users and the general public. As shown in Table 4, the key messages to be conveyed regarding SMARTeeSTORY are fit to the interests of the target groups as identified in Chapter 2. The tools used to address these audiences may overlap (see Table 5, Chapter 3.7).

Table 4: SMARTeeSTORY key messages

Target Group	Why are they interested in SMARTeeSTORY?	Why are they interesting to SMARTeeSTORY?	Key Messages
Potential end-users, consumers, citizens	- Desire for more comfort or energy efficiency in historic buildings - Appreciate the value of historic buildings - Save money through more efficient buildings	- Direct beneficiaries/ first hand users of developed solutions and energy optimisations - Able to provide direct feedback - Might be sceptical of change, have thus important concerns to be considered	With SMARTeeSTORY, your office/classroom/public building will become smarter and more energy efficient. Via intelligent and user-centred optimizations to keep pace with increasingly digital lives., working in historic buildings will become easier and more comfortable. We make historic buildings more efficient and more integrated, while preserving their unique cultural identity. Your building serves as a forerunner for other smartifications of historic buildings in the future – in your city, your country, and beyond.
Press, public media	- Looking for local news that are interesting to their readers - Being the first to share	- Best channel to spread information to a wide and diverse audience	With SMARTeeSTORY, your town hall/university/courthouse will become smarter and more energy efficient.

	exciting developments in research and science		Thirteen organisations from six countries work together to turn important historic landmarks into smart, energy efficient, and integrated buildings while preserving their unique cultural identities. By combining energy efficiency, renewable energy sources and the latest digital and smart technologies, local historic landmarks are turned into climate neutral buildings, thus showcasing, and accelerating the green and digital transition to the general public.
Academia, researchers	- Staying ahead of latest research in digitalization - Seeing theory turned into reality and applied in practice - Learning from SMARTeeSTORY, identify bottlenecks or errors	- Able to further improve/develop applied technologies	At SMARTeeSTORY, we develop smart, automated, and digital control systems to monitor and optimize the energy performance of historic buildings, while preserving their identity and physical integrity. Via an innovative multi-domain approach, integrating e.g., HVAC, dynamic façades, lighting and EV charging stations, we establish a replicable and customizable technological infrastructure. We actively share our knowledge to facilitate uptake and collaboration, via workshops, site visits, training sessions, and networking events.
Industrial groups	- Staying up to date with latest developments in smart buildings	- Good channels for dissemination of results - Acting as multipliers in spreading knowledge about SMARTeeSTORY - Able to further improve/employ applied technologies	SMARTeeSTORY focuses on the smartification of historic buildings where traditional energy renovation is not an option. We develop smart, automated, and digital control systems to optimize historic buildings while preserving their unique identity and physical integrity. The project establishes a replicable and customizable technological infrastructure. We actively share our knowledge to facilitate uptake and collaboration, via workshops, site visits, training sessions, and networking events.
ESCOs	- Increasing savings/profits by identifying new possibilities for energy efficiency - Interest in latest	- Able to further employ applied technologies	SMARTeeSTORY focuses on the smartification of historic buildings where traditional energy renovation is not an option. We develop smart, automated, and digital control systems and combine energy

	developments to further improve own services		efficiency, renewable energy sources and digital and smart technologies to turn local historic landmarks into climate neutral buildings. Follow us to learn how the SMARTeeSTORY technology can improve your company's services.
SMEs and large technology providers	- Identifying latest technological trends and possibilities - Participating in learning opportunities (workshops, trainings, etc.)	- Representing players and trends to watch in the current smart building market - Multipliers of information and activities from SMARTeeSTORY	SMARTeeSTORY focuses on the smartification of historic buildings where traditional energy renovation is not an option. We develop smart, automated, and digital control systems to optimize historic buildings while preserving their unique identity and physical integrity. We actively share our knowledge to facilitate uptake and collaboration, via workshops, site visits, training sessions, and networking events.
(Relevant) projects and initiatives, communities, networks, platforms	- Identifying synergies for future collaborations - Learning from each other's mistakes, avoid repetition, learn from different perspectives - Increase collective reach via joint events and activities - Increase own visibility	- Identifying synergies for future collaborations - Learning from each other's mistakes, avoid repetition, learn from different perspectives - Increase collective reach via joint events and activities - Increase own visibility	SMARTeeSTORY focuses on the smartification of historic buildings where traditional energy renovation is not an option. Thirteen organisations from six countries work together to turn important historic landmarks into smart and integrated buildings while preserving their unique cultural identities. Our focus lies on developing smart, automated, and digital control systems by combining energy efficiency, renewable energy sources and digital and smart technologies. We want to actively share our knowledge to facilitate uptake and collaboration, via workshops, site visits, training sessions, and networking events.
Associations	- Interest in latest developments that might affect them (positively or negatively) - Identifying learning possibilities, e.g., trainings, workshops, site visits	- Bringing a different point of view to the table, e.g., insights from specialised groups - Multipliers of outreach for project activities	With SMARTeeSTORY, historic buildings become smarter and more energy efficient. Thirteen organisations from six countries work together to turn important cultural landmarks into smart and integrated buildings while preserving their unique identities. By combining energy efficiency, renewable energy sources and digital and smart

			technologies, we create climate neutral historic buildings, thus showcasing and accelerating the green and digital transition to the general public.
Policy makers	- Interest in what are the latest technologies /developments → Key to policy changes	- "Drivers of change" → able to actively shape EU funding programmes	Via an innovative multi-domain approach, SMARTeeSTORY focuses on the smartification of historic buildings where traditional energy renovation is not an option, preserving the unique identity and physical integrity of cultural landmarks that are of crucial value to Europe. We support the EU's ambition towards decarbonization while simultaneously improving people's quality of life. SMARTeeSTORY develops smart, automated, and digital control systems to optimize historic buildings, thus establishing a replicable and customizable technological infrastructure. We make sure to actively share our knowledge to facilitate uptake and collaboration.
Public authorities	- Interest in improving energy efficiency and wellbeing of their citizens - Desire for their country/city to stand out, be special, be better than others	- Able to support with regulations, laws, barriers, national/local funding opportunities	Via an innovative multi-domain approach, SMARTeeSTORY focuses on the smartification of historic buildings where traditional energy renovation is not an option. With a focus on user centred optimizations and the specific human requirements, we develop smart, automated, and digital control systems, thus establishing a replicable and customizable technological infrastructure. We accelerate the green transition while preserving the unique identity and physical integrity of cultural landmarks of crucial value to Europe and your city.
Potential investors	- Identifying interesting investment possibilities	- Increase interest and investment in digitalisation of (historic) buildings - Contribute to decarbonisation of European historic landmarks	At SMARTeeSTORY, we develop smart, automated, and digital control systems to optimize historic buildings so that they can become climate-neutral, while preserving their identity and physical integrity. Via an innovative multi-domain approach, SMARTeeSTORY will thus establish a replicable and customizable technological infrastructure.

			The smartification of historic building is a novel approach to digitalization and energy efficiency that will be of high value in the future.

3.4. Impact Assessment

STEINBEIS will – together with the SMARTeeSTORY project partners – regularly measure the impact of the project's D&C activities, both quantitatively, e.g., by counting participants at events or follower numbers on social media, and qualitatively, e.g. by considering SMARTeeSTORY outputs such as engagement in the project, uptake of lessons learned or replication of results. The KPIs for each D&C activity will be elaborated in Chapter 3.7.

In the case of certain activities where it is not possible to get absolute numbers for external audiences, such as at exhibition stands, plausible estimates or averages will be provided.

A regular evaluation of the project's impact and success concerning the D&C activities ensures that the implemented measures will reach their aim. In case certain measures are less effective than envisaged, the SMARTeeSTORY partners, with the support of STEINBEIS and the D&C Team, are able to adjust the planned measures in time.

3.5. EU Funding Reference

As described in the Grant Agreement under Article 17, for any publication and dissemination of results stemming from SMARTeeSTORY, both in printed or electronic form, the EU emblem, and the funding reference "Co-funded by the European Union" must be included.

This includes communication activities such as media relations, conferences, seminars, information material, such as brochures, leaflets, posters, presentations, etc. via traditional or social media, as well as dissemination activities and any infrastructure, equipment, vehicles, supplies, or major result funded by the grant.

The funding statement (Figure 3) can also be used in the local language versions as provided by the EU[3], where appropriate.

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[3] Inforegio - Download centre for visual elements (europa.eu)

Figure 3: EU funding statements to be used by the SMARTeeSTORY consortium

The EU emblem must remain distinct and separate. It is not allowed to modify the logo or the text (also no shortening, lengthening, etc.). It is not allowed to use any other type of EU logo to reference the EU funding, nor is it allowed to change it to "Funded by the European Union" (instead of co-funded).

When displayed together with other logos, the EU emblem must be displayed at least as prominently and visibly as the other logos.

Furthermore, any communications of the project and dissemination of results must indicate that it reflects only the author's view, and that the EC is not responsible for any use that may be made of the information it contains. Example of a disclaimer statement:

This communication related to the action SMARTeeSTORY is made by the beneficiaries and reflects only the author's view. The European Commission is not responsible for any use that may be made of the information it contains.

This document reflects only the author's view, and the European Commission is not responsible for any use that may be made of the information it contains.

The official EU emblem and funding reference can be downloaded from the EC website[4] and must be used according to the communication guidelines provided by the EU[5].

3.6. Corporate Identity

A clear recognition value is very important for a project. Early in the project, STEINBEIS in cooperation with a graphic design agency and in close contact with RINA-C, developed the SMARTeeSTORY Corporate Identity (CI), consisting of a project logo, unique colour scheme, key visual, and other elements that allow visual identification of the SMARTeeSTORY project. The SMARTeeSTORY CI is a core aspect of the D&C materials and is to be used in all project communication materials. For this and to guide partners, a design and brand style guide has been created, detailing the use of the different elements of the CI.

The consistent use of these CI elements in all communication materials, whenever possible, ensures a recognition value and consistency clearly linking the SMARTeeSTORY project. All

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[4] https://ec.europa.eu/regional_policy/information-sources/logo-download-center_en
[5] https://rea.ec.europa.eu/communicating-about-your-eu-funded-project_en

SMARTeeSTORY CI elements as well as the guide are accessible for the consortium partners on the project's internal file sharing platform.

The individual CI elements are described in more detail below.

3.6.1. Logo

The logo consists of an icon and the name of the project. Its main colour is blue, with a subtle gradient from a lighter to darker blue. The icon shows a dark blue historic building with gradient turquoise to blue lines, representing connectivity and thus smartification. In the project name, the final letter "y" is represented by a plug to further emphasize the relation to energy efficiency. The logo will be used mainly in dark blue colour with white background, except when the readability would be affected. In that case, the use of the version with white colour on a dark blue background is encouraged. The different logo versions are displayed in Figure 4.

Figure 4: SMARTeeSTORY logo

3.6.2. Colours

The SMARTeeSTORY project colours consist of three main colours (Dark midnight blue, Pearl aqua, and Celestial blue) and one complementary colour (Radical red) that can be used to make some elements stand out. The colour codes are illustrated in the following:
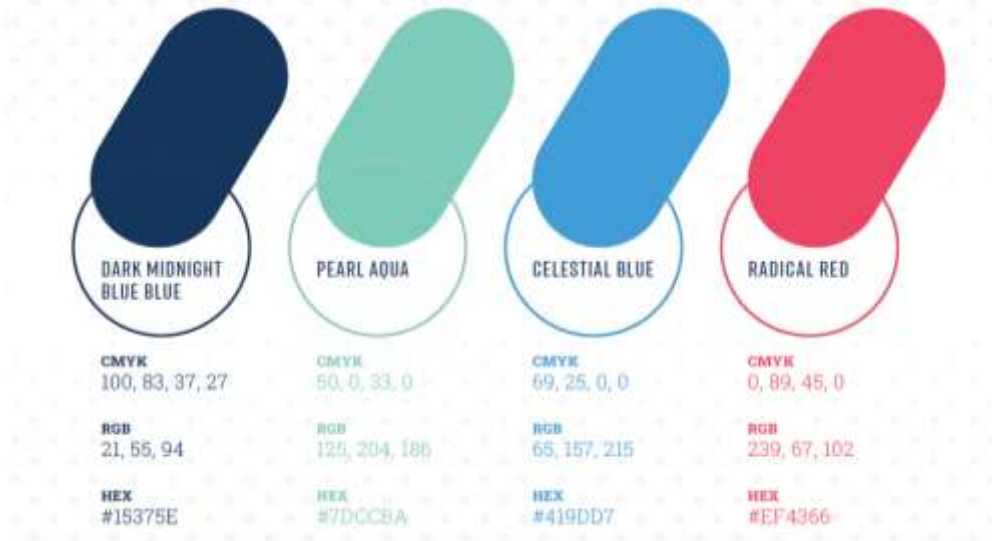
Figure 5: SMARTeeSTORY colour codes

The consistent use of the same colour palette across all SMARTeeSTORY communication products is very important to further establish the project's branding.

3.6.3. Key Visual

The key visual (Figure 6) communicates the identity of SMARTeeSTORY and its activities. It will be used on the website, the flyer, on social media and on all other communication materials wherever suitable. The key visual shall only be used in its entirety in large, without cropping or reduction of the image size.

Figure 6: SMARTeeSTORY key visual

The key visual represents all three buildings from the SMARTeeSTORY demonstrators, with connectivity lines and further elements to symbolize smartification and digitalization.

Within the key visual, there are three kinds of icons:

- outlined isometric icons (in the boxes): representing key elements of SMARTeeSTORY, such as the combination of software and hardware (laptop), the cloud platform (cloud with lock), smart blinds (blinds with smartphone) or HVAC (air conditioner).

- real icons: acting as decoration to give balance to the key visual (e.g., trees or clouds) or to showcase essential assets the project will use (people, renewable energy in the form of a wind turbine and solar panels, battery, AI)

- flat icons: showcasing key elements that are, however, not exclusive to SMARTeeSTORY (such as the Wi-Fi or instructions symbols)

3.6.4. Word, Presentation and Poster Templates

A series of templates have been created in *Microsoft Word* and *PowerPoint* which all partners can use for internal or external target groups regarding SMARTeeSTORY. The templates include:

o A general SMARTeeSTORY word template – for use with any information developed within SMARTeeSTORY *(Word)*

o A SMARTeeSTORY meeting minutes template – for the recording of meeting agendas and minutes *(Word)*

o A SMARTeeSTORY deliverable template – for obligatory use in the preparation of a deliverable *(Word)*

o A SMARTeeSTORY presentation template – for use whenever the project is presented *(PowerPoint)*

o A SMARTeeSTORY poster template – for poster presentations (*PowerPoint*)

Figure 7 provides a preview of the templates. The full templates can be downloaded by all partners from the SMARTeeSTORY SharePoint under WP6 folder.
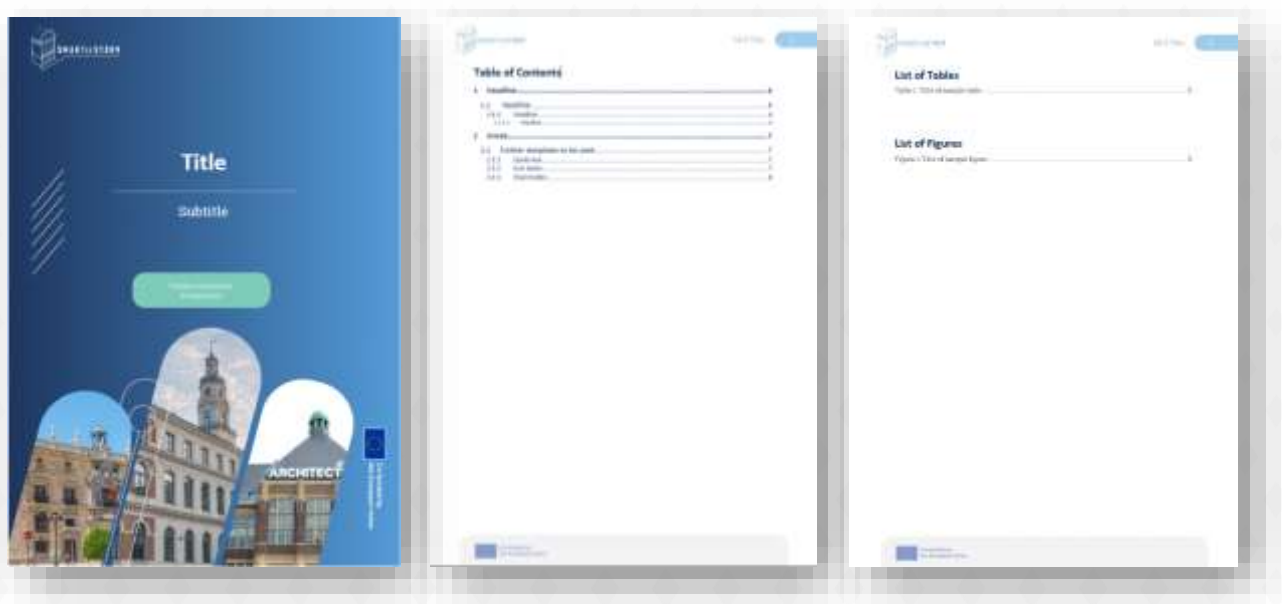
Figure 7: Preview of SMARTeeSTORY MS Word, PowerPoint, and poster templates

3.7.   D&C Materials and Tools

Within SMARTeeSTORY, a mix of different D&C materials and channels will be used, covering both printed and digital channels as well as other tools. This multi-channel approach ensures that a broad range of stakeholders and target audiences will be reached.

SMARTeeSTORY addresses different target groups that require different messages, communication styles (technical language vs. general, easily understandable information), channels and tools. As outlined in Task 6.2, the SMARTeeSTORY D&C materials and tools therefore consist of:

Table 5: SMARTeeSTORY D&C activities

Material/Tool	Dissemination	Communication
Project website	X	X
E-newsletter	X	X
Press releases	X	X
Blogs and news articles	X	X
Social media channels	X	X
Video		X
Flyer		X
Rollup		X
Scientific publications	X	
General (technical) publications	X	
White papers	X	
Trainings	X	
Launching event	X	X
Public events		X
Workshops (incl. site visits)	X	
Final event	X	X
Coordinated events	X	X
Event participation	X	X

This chapter therefore provides the entire SMARTeeSTORY consortium with the following practical information about:

o Which SMARTeeSTORY D&C materials and channels exist and are planned in the future?

o Who is the target audience for the different channels and materials?

o Where do I find those materials and channels?

o How can I support WP 6 leader STEINBEIS in promoting and increasing the impact of SMARTeeSTORY activities?

Besides being informative, this chapter helps partners to identify channels and possibilities for own local activities to reach, for example, citizens. It explains the different tools, how they are to be used as well as defining the roles of the different partners in making use of these tools. Like this, we ensure to reach as wide an audience as possible as well as a successful D&C across the entire project. Table 6 provides an overview of the main SMARTeeSTORY D&C tools and channels, respective targets groups, aims, SMARTeeSTORY partners involved and expected KPIs. The following chapters then provide more detailed description of all materials and tools mentioned.

Table 6: Detailed overview of SMARTeeSTORY D&C activities

D&C Activities	Aim	Partners involved	Target Groups	Quantity or KPI
Digital Tools				
Project website	To raise interest in SMARTeeSTORY, to inform (in detail) about the project, objectives, activities, progress, interim outcomes, deliverables, partners, interesting links, and events, to provide downloads, published scientific articles, etc. (English).	STEINBEIS with input from all partners	All	min. 3,000 visitors by M48
E-newsletter	To raise interest in SMARTeeSTORY, to inform about project news and updates from the demonstrators, inform about related projects or the field in general, linking to website, to enable exploitation (English).	STEINBEIS with input from all partners	All	overall, 6 issues, min. 100 subscribers by M48
Press releases	To raise interest amongst the media in SMARTeeSTORY, to inform about project activities, progress, and outcomes, to promote certain activities/ milestones, to engage citizens at local level (English and local languages).	All partners	All	overall, 7 issues
Blogs & news articles	To raise interest in SMARTeeSTORY, to inform about project activities, progress, interim outcomes, and final outcomes, to promote certain activities/milestones, to inform about technical outcomes, uploaded to website and linked on social media (English).	STEINBEIS with input from all partners	All	6 per year, overall, 24 articles
Social media	To raise interest in SMARTeeSTORY, to inform about project progress and news, to promote events and possibilities to get in touch with SMARTeeSTORY partners (in English, with partners sharing and translating content to local pages). For LinkedIn additionally: to spread technical information and to foster (technical)	STEINBEIS with input from all partners	All	X: about 500 followers by M48 LinkedIn: about 300 followers by M48

	discussions on SMARTeeSTORY topics, to promote replication and exploitation (English).			
Video	An explanatory video to present the SMARTeeSTORY goals and main results (English with local language subtitles).	STEINBEIS	All	1 video
Printed Tools				
Flyer	To raise interest in SMARTeeSTORY, inform about the demonstrators, project objectives, methods, partners, etc., linking to website and social media channels (English).	STEINBEIS to design, all partners to print on demand and distribute	All except: • Policymakers • Public authorities • Potential investors	1 flyer
Roll-up	To raise awareness and increase visibility of SMARTeeSTORY, to increase interest in and inform about SMARTeeSTORY at events, conferences, or meetings.	STEINBEIS	All except: • Policymakers • Public authorities • Potential investors	1 rollup
Scientific publications	To publish and disseminate project results and technical outcomes to a scientific audience to promote further development, replication, and exploitation. Open access peer-reviewed papers in renowned international journals with gold access.	Academic partners	• SMARTeeSTORY project partners • Academia, researchers • Industrial groups • SMEs and large technology providers • (Relevant) projects and initiatives, communities, networks, platforms • Associations	min. 7 scientific publications
General publications	More general (technical) publications in printed or online industrial and scientific journals targeting various stakeholder groups.	Technical partners	All except: • Potential end-users, consumers, citizens	min. 10 publications
White papers	White papers for policy makers describing the SMARTeeSTORY developments and bottlenecks as well as barriers for implementation, especially regarding innovation in the area energy efficient buildings. Providing recommendations on how to link SRI and EPC.	RINA-C, Technical partners	• SMARTeeSTORY project partners • Academia, researchers • Industrial groups • SMEs and large technology providers	2 white papers

			• (Relevant) projects and initiatives, communities, networks, platforms • Policymakers • Public authorities	
Events				
Internal and external trainings	Trainings in the form of webinars and e-learning materials, to facilitate knowledge transfer among partners (internal training) and between SMARTeeSTORY and external stakeholders (external training).	STEINBEIS, RINA-C, TUD, TECNALIA, CARTIF	• SMARTeeSTORY project partners • Academia, researchers • Industrial groups • SMEs and large technology providers • (Relevant) projects and initiatives, communities, networks, platforms • Associations	3 internal trainings 3 external trainings
Launching event	A launching event in M24, in collaboration with sister projects, to present intermediate results and establish possible synergies with relevant projects.	STEINBEIS with RINA-C and all partners	All	1 launching event
Public events	To stress the importance of smart energy efficiency buildings and demonstrate the benefits and positive impact of EU-funded research and innovation activities on everyday life.	TUD, RTU, CARTIF, RINA-C, STEINBEIS	All except: • Academia, researchers • Industrial groups • ESCOs • SMEs and large technology providers • Policymakers • Potential investors	5 events
Workshops (incl. site visits)	Workshops including site visits for future customers and relevant (industrial) stakeholders.	Technical partners	All except: • Academia, researchers • Policymakers • Public authorities • Potential investors	3 workshops
Final event	In cooperation with sister projects, taking place in Brussels around M37-48. To share learnings and results from SMARTeeSTORY to an	STEINBEIS with RINA-C and all partners	All	min. 50 participants, at least 30 policy makers

	international audience (policy makers, researchers, industrial representatives, related projects), to promote the use of SMARTeeSTORY results beyond the project period.			
Joint/Coordinated events	Digital or on-site events in M12, M24, M36 and M46, in cooperation with sister projects and other European initiatives. With a particular emphasis on the connection with the European Partnership on 'People-centric sustainable built environment', to share intermediate results and possible common paths to follow.	RINA-C with STEINBEIS and all partners	All	4 joint events
Event participation	Participation in exhibitions, scientific conferences, workshops, industrial events with paper or poster presentations to share project results.	All partners	All	min. 20 events and 10 presentations

3.7.1. Digital Tools

3.7.1.1. SMARTeeSTORY Project Website

The SMARTeeSTORY website (www.SMARTeeSTORY.eu) is the key instrument for external communication of the project, bringing all D&C activities together in one place. It constitutes the central knowledge base for the project partners and beyond, presented in the English language.

Following the CI of SMARTeeSTORY, at M4, a static preliminary version of the website has been made public, providing short information about the project objective, the social media channels, and the main contact points. By the end of M6, the final version of the website will go online, with content from all partners, offering general and individual information for external purposes in a clear and structured manner.

STEINBEIS is responsible for the website's set-up and maintenance, whereas the content is strongly dependent on the input of the project partners, WP leaders and the demonstrator partners in particular. The final SMARTeeSTORY website will be set up with the following pages:

- o **Home**: landing page and teaser to other sections
- o **About**: objectives, challenges, expected impact, involved partners
- o **Demonstrators**: information about each of the three demonstrators, including challenges faced and solutions pursued
- o **News** & **Events**: blogs, articles, events
- o **Outcomes** (later in the project): results of the projects, e.g., deliverables, scientific publications, white papers
- o **Info Corner**: press releases, newsletters, downloads
- o **Contact** & **Social Media**: contact info to get in touch with the project as well as links to social media channels

The website will be continuously managed by STEINBEIS until the end of the project and be updated with relevant information about project results and achievements with inputs from the project partners. The website will remain active as a static version after the end of the project for at least three more years. The website contents will be regularly adapted and updated depending on the needs of the project and the partners.

The KPI of a successful website is to reach and thus inform at least 3,000 individual website visitors by the end of the project (M48).

3.7.1.2. Newsletter

The aim of the newsletter is to raise interest in SMARTeeSTORY and inform subscribers about the project's activities and progress from the previous six to eight months, to announce important upcoming activities, and to share external perspectives that are relevant for the project. Its content will be strongly linked to the website to increase traffic.

The publicly available SMARTeeSTORY e-newsletter will be published around every six to eight months. The first issue will be published around M6, once the final website has gone live. It will be included in the website's newsletter archive once sent out.

STEINBEIS is mainly responsible for coordinating, drafting, and sending out the newsletter but will receive active inputs from the partners via the monthly D&C meetings or bilateral communications. Before publishing the newsletter, it will be sent for review to the partners and lastly to RINA-C for approval before final publication.

The newsletter distribution list will be set up by STEINBEIS according to the latest EU General Data Protection Regulations. Subscribers can subscribe and unsubscribe themselves at any time via the project website. They will have to do a double opt-in and will be informed in detail about what kind of information will be collected, what the distribution list will be used for, and how they can unsubscribe.

Overall, six newsletter issues will be published by the end of the project (M48). The KPI of a successful newsletter is to reach at least 100 subscribers by the end of the project.

3.7.1.3.   Press Releases

Based on inputs from the D&C Team, STEINBEIS will prepare general press releases to inform about important SMARTeeSTORY activities, such as project events or milestones. The target audience of these more general press releases covers media and all interested stakeholders, including both a dissemination- and communication-focused audience. They will be prepared in English and sent out to the D&C Team for further translation and distribution to local press and media offices.

Additionally, SMARTeeSTORY partners, especially the demonstrators, will prepare press releases to inform about more specific or local SMARTeeSTORY activities and to engage local citizens in the local language. The target audience of these more specific press releases is the potential end users, consumers and citizens of the respective historic building/city, local press and media and (local) associations. These press releases will also be translated (where relevant) to English and published to the SMARTeeSTORY website, to reach any other potentially interested stakeholders.

The KPI is to publish 1 to 2 press releases per year, based upon news-worthy content or activities. Overall, 7 press releases will be published by the end of the project.

3.7.1.4.   Blog & News Articles

The overall management of blogs and news articles will be taken over by STEINBEIS. News and blogs contain information about the project or news from partners (events, ongoing activities, milestones, etc.). These non-scientific articles inform a broad audience, relying on active inputs from partners via the D&C Team, who will contribute to the writing of the articles. All news and blog articles will be promoted via the social media channels and the SMARTeeSTORY newsletter.

The KPI is to publish at least one news or blog article every other month on the SMARTeeSTORY website. More articles will be published based upon availability of news updates from the D&C Team, especially the demonstrators. By the end of the project, at least 24 news articles and/or blogs will have been published.

3.7.1.5.   Social Media Channels

Social media channels are great tools to quickly and regularly inform broad (or targeted) audiences about project news, upcoming, ongoing, or past events, as well as research outputs. It is a great way of directly getting in touch with stakeholders, which makes the project more personal and accessible, and thus sets the basis for a two-way exchange. Moreover, social media directs readers towards the website, thus increasing traffic and visibility of the project.

STEINBEIS will manage all SMARTeeSTORY social media channels, while at the same time encouraging partners to actively contribute, like and share contents as well as to get into a dialogue with various stakeholders. All partners are asked to actively engage with and invite their own networks to follow the SMARTeeSTORY accounts. Local partners will translate selected posts and cross-post them to their own channels. Inputs for social media are regularly provided by the members of the D&C Team to STEINBEIS.

SMARTeeSTORY mainly uses two social media platforms:

- o **LinkedIn**, which is a professional networking and communication platform with more informative and technical contents. It will target a more professional, technical, and scientific audience.
- o **X**, previously known as "Twitter," is a dynamic and diverse social media platform based on short and engaging messages and news. It will target a broad audience.
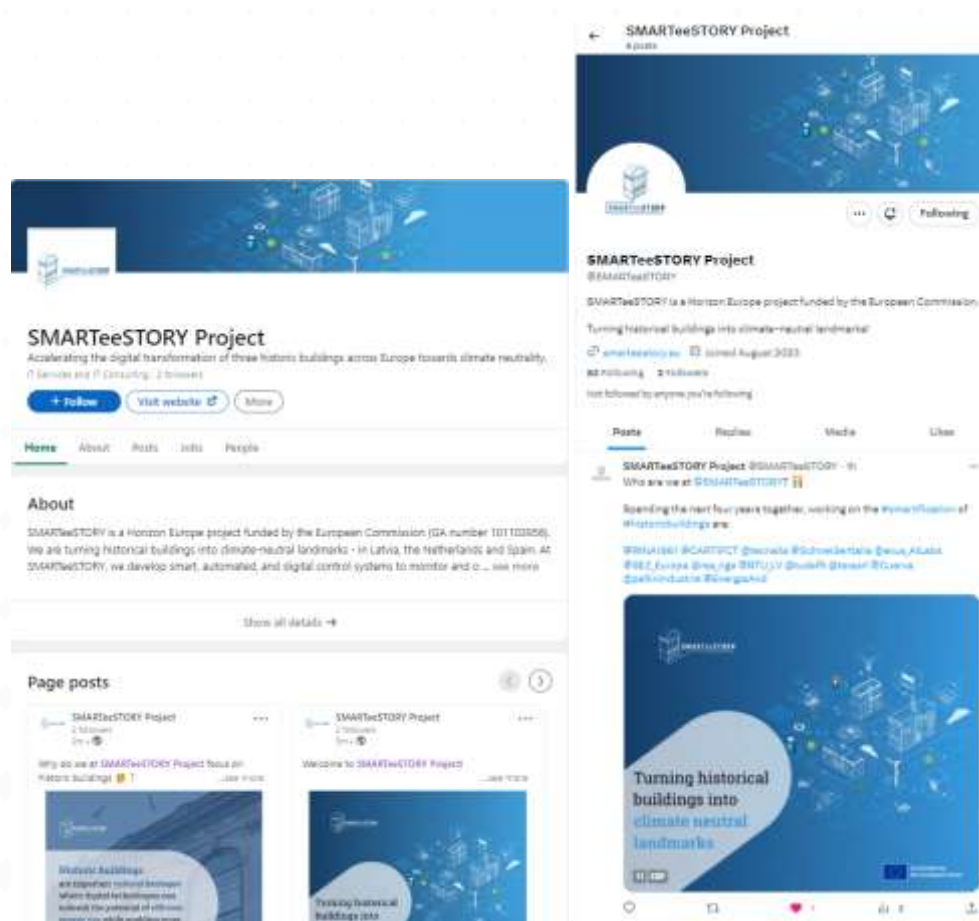

Figure 8: SMARTeeSTORY LinkedIn and X channels

Due to the fast pace of social media trends, the selected channels will be regularly assessed, and adjustments will be made, where necessary. For now, SMARTeeSTORY will focus its social media activities on LinkedIn and X. Both channels are integrated into the project's website. If needed, a YouTube channel will be set up once the project produces the respective video content.

To win followers on both LinkedIn and X, it is useful to follow other interesting or related channels and to engage with them via liking, sharing, commenting, etc. Possible channels to be followed are:

- o Similar European projects funded by Horizon 2020 / Horizon Europe / the European Commission, such as SATO, MODERATE, CHRONICLE or SmartLivingEPC
- o Projects funded under the same call (sister projects), such as BuildON
- o Relevant European initiatives, such as Built4People, AutoDan or DigiBUILD
- o Relevant EC / EU channels, such as the European Commission and CINEA
- o Project partner's channels and pages
- o Relevant bigger conferences or events in the field, such as EUSEW or IEECB&SC
- o Individual project partner's pages (especially on LinkedIn)

The KPI is to reach 300 followers on LinkedIn and 500 followers on X by the end of the project (M48).

LinkedIn

The SMARTeeSTORY LinkedIn account is called @SMARTeeSTORY Project (Link: https://www.linkedin.com/company/smarteestory-project). It provides a more detailed and technical overview of what is going on in the project, providing links to related (technical) websites for more details plus giving the opportunity to comment on or share the latest information with one's own professional network. LinkedIn is an effective tool to spread important information, publications, etc. to a technically interested audience. Generating followers means generating a professional community around SMARTeeSTORY that shares news in time and keeps in touch with the project.

LinkedIn must register with their actual names and the CVs in the users' profiles include a high degree of personal information. Even though LinkedIn is a professional network at its core, more and more users use it to disclose personal information and political views. Therefore, communication through LinkedIn performs exceptionally well because the project is linked to real people (e.g., members of the consortium).

Target Audience

LinkedIn focuses on a professional community, addressing a dissemination-focused audience, including project partners, related projects, policy makers, public authorities, technical professionals, SMEs, researchers, investors, and service providers.

Type of Content

LinkedIn will be used to push information about SMARTeeSTORY or from SMARTeeSTORY partners as well as any content related to the smartification of buildings and/or historic buildings to a dissemination-focused audience. Posts can contain SMARTeeSTORY internal news, e.g.

technical news articles, events interesting to a scientific audience (past as well as upcoming), project meetings (e.g., General Assemblies, site visits), participation to joint activities, (technical) updates from the different demonstrators and WPs in general, project publications, news about the main results of SMARTeeSTORY, as well as SMARTeeSTORY external news (e.g. Launch or Final Event, workshops, trainings, news from the European Commission). Any other type of non-related content shall not be posted unless highly relevant to the community.

Language

The language to be used on LinkedIn will be full sentences written in English, addressing the reader in a friendly and communicative format. Since the target audience of LinkedIn leans towards the professional and scientific community, posts can make use of both, an easy-to-understand language as well as a specialised language using technical terms. There should be a mixture of shorter and longer posts, not exceeding 1,000 characters. Structuring the posts into several paragraphs increases readability. Hashtags can be used within the text but should primarily be listed at the end of a post.

Frequency

About one individual post with high quality content should be posted every other week, depending upon availability of news from the partners.

Impact Measurement

- o **Methods:** Number of overall followers; new followers per month; impressions, views and clicks; reactions, comments, and shares.
- o **Objectives:** The LinkedIn impact will be considerably increased by producing high quality and elaborate content which will attract and engage new and interested stakeholders as well as re-activate existing ones.
- o **Followers:** By M12, at least 50 LinkedIn followers shall be reached. By the end of the project, the KPI is to have about 300 followers.

Management

The SMARTeeSTORY LinkedIn account is managed by STEINBEIS. All SMARTeeSTORY partners, especially the D&C Team, are asked to:

- o Regularly provide input regarding news that should be promoted.
- o Follow and interact: Post SMARTeeSTORY updates via own LinkedIn profile or organisation's LinkedIn company page. It is important that the official SMARTeeSTORY channel is then tagged by writing "@SMARTeeSTORY Project". Also, partners are asked to share and/or like and/or comment on SMARTeeSTORY posts.

General Advice

- o LinkedIn posts should be longer and include more detailed information than those on X, but generally not exceed 1,000 characters.
- o The use of digital media such as pictures, videos, 360° pictures, links to events or further information, etc. is highly encouraged.
- o Trending or commonly used hashtags (#) should be used to reach a specific audience and

to be found by interested stakeholders. Every event, organisation, initiative etc. usually has a specific hashtag that should be used.

o The use of general hashtags related to SMARTeeSTORY are encouraged, such as #SmartHistoricBuildings, #SmartBuildings, #SmartInfrastructure, #EnergyEfficiency, #DigitalTransformation

o To make project partners aware of a post, it is useful to tag individuals involved in or affected by it.

X

The SMARTeeSTORY X account @SMARTeeSTORY (Link: https://twitter.com/SMARTeeSTORY) provides a quick and up-to-date overview of what is going on in the project, providing links to related websites and activities for more details, plus giving the opportunity to like, comment or share the updates. X used to be known under the name "Twitter" but has been changed to "X" in July 2023. X is an effective tool to spread information to a very wide and diverse audience. Generating followers means creating a community around SMARTeeSTORY that shares the project news in time and keeps in touch with the project. Compared to LinkedIn, it is much easier for related projects and initiatives to follow the SMARTeeSTORY account on X. Therefore, X is particularly suitable to liaise with related projects and initiatives in following the account.

In October 2022, then called Twitter, underwent a change in ownership. With subsequent modifications already being introduced to the platform, this transition raises potential implications, such as a shift in the platform's user base. As a result, monitoring of X is crucial to determine if this platform continues to be appropriate for the dissemination and communication of SMARTeeSTORY information and activities. The rest of this section assumes the usage of X under the conditions prior to the change.

Target Audience

X has both a dissemination- and a communication-focused target audience. It is tailored towards a broad audience, including project partners, other projects, initiatives and networks, public administrations, policy makers, citizens, consumers, organisations and associations, NGOs/Non-profits, and media.

Type of Content

X will be used to push information about SMARTeeSTORY or from the SMARTeeSTORY partners as well as any content related to the smartification of buildings and/or historic buildings to a broad audience.

Posts can contain SMARTeeSTORY internal news, e.g., technical news articles, events interesting to a scientific audience (past as well as upcoming), project meetings (e.g. General Assemblies, site visits), participation to joint activities, (technical) updates from the different demonstrators and WPs in general, project publications, news about the main results of SMARTeeSTORY, as well as SMARTeeSTORY external news (e.g. related project's events, news from the European Commission). Any other type of non-related content shall not be posted unless highly relevant to the community.

To attract the attention of followers and boost the outreach of the tweets, the channel makes use of graphical and interactive social media templates that help followers identify the project quickly. This can include events announcement templates, or a newsletter registration templates

as well as certain standardised/recurring post templates with a personal element. Short video clips or gifs will also be included to attract the attention of the followers.

Language

The language to be used on X will be full sentences written in English, addressing the reader in a friendly and communicative format. To make sure that not only a scientific community but also the broad public is reached, the language should be easy to understand without making use of technical terms. Tweets should be kept short and to the point, with a maximum of 280 characters, including the most important information without sounding brief or dull. Structuring the tweet into several paragraphs increases readability. Hashtags can be used within the text but should not be used exceedingly to keep readers from stumbling across the text. More hashtags can be added at the end. Selected emojis can be added where reasonable to increase the attractiveness or enable a better understanding of the post.

Frequency

- o 1 individual tweet with high quality content will be posted per week, more will be posted based upon the availability of news content or while at events etc.
- o 2 retweets of high-quality external content will be shared per week, more upon availability of interesting content.

Impact Measurement

- o **Methods:** Number of overall followers, new followers per month, likes, shares, interactions, overall reach
- o **Objectives:** The X impact will be increased by producing high quality and elaborate content interesting to the SMARTeeSTORY community which will attract and engage also new stakeholders.
- o **Followers:** By M12, at least 100 X followers shall be reached. By the end of the project, the KPI is to have about 500 followers.

Management

The SMARTeeSTORY X account is managed by STEINBEIS. All SMARTeeSTORY partners, especially the D&C Team, are asked to:

- o Regularly provide input regarding news that should be promoted.
- o Follow and interact: Tweet via own X or organisation's X account. It is important that SMARTeeSTORY is then linked to by writing @SMARTeeSTORY. Also, partners are encouraged to share/re-tweet and/or like SMARTeeSTORY posts.

General advice on X

- o The use of digital content, e.g., pictures, videos, 360° pictures, etc. leads to more interactions and a higher visibility.
- o Conversations should be encouraging (by posing questions, thanking others that mentioned the project, directly addressing the audience, etc.).
- o Best days and times for posts are when the target audience is online. As a rough guideline, Monday through Thursday, 8-9 am are good times to post. It will be evaluated in the next few months if these general recommendations also apply to the SMARTeeSTORY community.

- o   To make partner organisations or related projects aware of a new post, it is useful to tag those involved in/affected by it.

- o   Trending or commonly used hashtags (#) should be used to reach a specific audience and to be found by interested stakeholders. Every event, organisation, initiative etc. usually has a specific hashtag that should be used. Moreover, the use of general hashtags related to SMARTeeSTORY and the smartification of (historic) buildings are encouraged, such as #SmartHistoricBuildings, #SmartBuildings, #SmartInfrastructure, #EnergyEfficiency, #DigitalTransformation

3.7.1.6.   Video

An explanatory video will be created by STEINBEIS at around M40, to present the SMARTeeSTORY goals and first main results. The video will be developed following the SMARTeeSTORY CI guidelines. It will be in English language with the possibility of adding subtitles in the languages of the local demonstrators, where needed. The video will be published at the website and cross-posted to the different social media channels.

3.7.2. Printed Tools

3.7.2.1.   Flyer

To raise interest in SMARTeeSTORY, an English project flyer will be produced around year 2 to inform about the project objectives, the demonstrators, applied methods, involved partners, etc. There will be a link and a QR-code leading to the website as well as the social media channels. To avoid waste where possible, the flyer will be printed on demand by the partners in need. The flyer can then be distributed at local level and at national and international events. A digital version will be uploaded to the website.

3.7.2.2.   Rollup

To raise awareness and increase the visibility of SMARTeeSTORY, a general roll-up in English language will be developed around M6. The rollup will be designed in the official SMARTeeSTORY brand identity, providing general information about the project, to be used at events or networking activities.

3.7.2.3.   Scientific Publications

SMARTeeSTORY's academic partners will actively disseminate their research and technical outcomes in the form of scientific publications or as part of conference proceedings in national and international journals identified by the consortium. For all scientific publications, gold open access must be guaranteed. Some identified journals include e.g., Automation in Construction, Sustainable Cities and Society, Energy, Energy and Buildings, Journal of Building Engineering, Buildings, Energies, Building and Environment, Energy Reports, Energy and AI.

All scientific publications will be cross-published at the website with links to the open-access version.

As a KPI, at least 7 scientific publications will have been published by the end of the project (M48).

3.7.2.4.   General Publications

In addition to scientific publications, several, more general technical publications will be developed and published in printed or online industrial and technical journals such as e.g., MDPI journals (e.g., Energy, Applied Energy, etc.), ASME and ELSEVIER journals, Journal of Building Engineering, targeting various stakeholder groups, thus going beyond the academic community.

All general publications will be linked at the website.

As a KPI, at least 10 general publications will have been published by the end of the project (M48).

3.7.2.5.   White Papers

Towards the end of the project, there will be two (digital) white papers written as an outcome of the project:

1. A white paper describing the SMARTeeSTORY developments based on project outputs and the bottlenecks as well as barriers for implementation, written by the technical partners.
2. A white paper to inform policy makers providing recommendations about how to assess SRI with reference to historic buildings and to possibly integrate SRI and EPC schemes and/or other related initiatives, written by RINA-C.

Once published, the digital versions of the white papers will be published on the website.

3.7.3. Events

3.7.3.1.   Internal and External Trainings

The project will provide two types of dedicated trainings to facilitate knowledge transfer among project partners (internal training) as well as between SMARTeeSTORY and external stakeholders (external training).

The trainings will be delivered digitally, in the form of webinars and supporting e-learning materials (like slide decks, interactive materials, a "how to", etc.), which will be made available to registered users. The trainings will be developed by RINA-C with support from TUD, TECNALIA and CARTIF. STEINBEIS will support with the development of training materials and the logistics of the webinars.

The purpose of the trainings is to gain a deeper comprehension of the inherent advantages associated with integrated energy management and control within buildings. They should serve as a catalyst for greater acceptance and implementation of the SMARTeeSTORY solutions.

Internal Trainings

The internal trainings consist of three sessions which will take place between M6-M48.

The purpose of the internal trainings is to teach the project partners about the project's developments and to facilitate knowledge transfer among the SMARTeeSTORY partner.

External Trainings

The external trainings consist of three sessions which will take place between M24-M48.

The purpose of the external trainings is to complement replication activities, thus increasing the understanding of the strength of integrated energy management and control in buildings as well as facilitating the uptake of project results.

The target group of these external trainings are, for example, associations, building owners, ESCOs, universities or technology centres.

3.7.3.2.   Launching Event

There will be a launching event taking place in M24 to present intermediate results and to establish possible synergies with relevant projects and initiatives. The event will be organized mainly by STEINBEIS with support from RINA-C and all partners, in collaboration with sister projects.

The target audience are related projects and initiatives, academia and researchers, industrial groups, ESCOs, SMEs and large technical providers, associations, policy makers and public authorities.

3.7.3.3.   Public Events

Overall, five public (side-) events will be organised to inform about the projects' developments and benefits to a broad public. These public events should be attached where possible to existing events such as open house events of project partner organisations or participations in science festivals. The aim is to stress the importance of smart energy efficient buildings and to demonstrate the benefits and positive impacts of EU-funded research and innovation activities on everyday life to the people that are directly affected by it, e.g., the building end users or citizens. Public events will be mainly organised by TUD, RTU, CARTIF and RINA-C with support from STEINBEIS regarding D&C activities. Partners can, for example, hand out the project flyer, hang up a project poster, pull up the roll-up or (later in the project), show the video.

The target audience are citizens, potential end-users, consumers, and the broad public.

3.7.3.4.   Workshops (incl. Site Visits)

Over the course of the project, the technical project partners will organise three on-site workshops including site visits. The purpose of these workshops is to foster knowledge sharing and capacity building to improve project outcomes, raise awareness of the opportunities offered by the

SMARTeeSTORY solutions and mitigate the knowledge gap to better understand the science behind the technology. Where possible, workshops will be attached to existing meetings to decrease travel requirements.

The target audience are academia and researchers, industrial groups, SMEs and large technical providers, associations, policy makers and public authorities.

3.7.3.5. Final Event

In cooperation with sister projects, SMARTeeSTORY will organize a final event around M37-48, led by STEINBEIS with support from RINA-C and all partners. The event will take place in Brussels, if possible, in the frame of another relevant EU event. The goal is to share learnings and results from SMARTeeSTORY to an international audience and to thus promote the use of SMARTeeSTORY results beyond the project. The event will facilitate networking, interaction, and creation of partnership and future business opportunities.

The target audience are policy makers, public authorities, academia and researchers, industrial representatives (SMEs and large technical providers, industrial groups, ESCOs, …) and related projects, initiatives, or communities as well as any other interested stakeholder.

As a KPI, at least 50 participants are expected, reaching at least 30 policy makers.

3.7.3.6. Joint/Coordinated Events

In addition to the launching and the final event, another four joint events are planned in cooperation with sister projects and other European initiatives, with a particular emphasis on the connection with the European Partnership on 'People-centric sustainable built environment'. SMARTeeSTORY will specifically liaise with relevant projects funded under the same or similar calls as well as with related EU initiatives, see Subtask 6.2.2 and the Stakeholder Mapping for specific projects and initiatives.

All consortium partners are members of related initiatives, networks and projects and will thus support the communication of SMARTeeSTORY outcomes via joint or coordinated activities. The personal connections of the consortium partners to members of other networks are a strong asset to the project and will therefore be used actively by all partners.

The events will be, for example, joint seminars, workshops, sessions, visits. Where possible, joint events will be organized back-to-back with other events, to minimize travel and to engage as many participants as possible.

The aim is to share intermediate results and identify possible common paths to follow. The events will be digital and/or on-site events.

Depending on the specific type of event, the target audience may vary but focuses always on related projects and initiatives.

3.7.3.7. Event Participation

All partners are required to participate in external local, regional, national, and international events to present SMARTeeSTORY and thus stimulate interest from stakeholders that are not yet involved in the project. There will thus be active participation in various exhibitions, scientific conferences, workshops, industrial events, etc. At least 20 events will be attended, including at least 10 paper or poster presentations to demonstrate project results and intermediate outcomes.

Some possible events are the International Building Physics Conference, Nordic Building Physics Symposium, Annual event of International Building Performance Simulation Association Conference (IBPSA), International Conference on Improving Energy Efficiency in Commercial Buildings and Smart Communities (IEECB&SC), Healthy Buildings Conference, REHVA CLIMA Conference, ASHRAE Conferences, IEA Annex 79 Symposium (Occupant-centric design and operation of buildings), IEA Annex 87 (Personal comfort models) Symposium, IEA Annex 81 (Data driven Smartbuildings) Symposium, REHABEND (conference), Sustainable Places (conference).

4. Conclusion

This deliverable informs project partners, external stakeholders, and the European Commission about all planned D&C activities, including details about the "why", "what"," when" and "who", describing the roles and responsibilities of the respective project partners. The D&C Strategy describes expected outcomes and KPIs and clarifies exactly which measures and which messages should be chosen to reach targeted stakeholders. This serves to reach as wide an impact as possible, thus increasing the visibility and replication potential of the SMARTeeSTORY solutions.

The D&C tools include visual material such as the Corporate Identity and digital and printed materials to spread information but also the different channels that will be engaged with the mentioned strategy. Various internal and external events will be organised and attended by the SMARTeeSTORY project partners to get into a direct exchange with stakeholders. Following the D&C cascade of information on both internal and external levels will ensure that both the outcomes of the project and the relevant information are promoted with a wide reach, creating the maximum impact possible.