

# Horizon 2020 Energy Efficiency

## Technical Progress Report

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# 1 Progress summary

## Achieved results of the period

The work of the first reporting period have been focused on laying a firm foundation for the project. A **Project Handbook** has been created and serves as an important tool for coordinating the project. Additional fundamental work has been created:

- A functioning first version of the ECO2 Platform (EngageSuite) (D4.1)
- A functioning project website has been created and can be found [here](#)
- A communication plan and communication package 1 (D2.1 & D2.3) was submitted 05.07.2018, and a revised version of these were submitted in January 2019
- A segmentation analysis (D6.1) outlining how the data collected by the ECO2 platform will be analysed
- Action Formats (D3.1) were submitted 31.08.2018 serving the ECO2 actions
- Content Guidelines (D5.1) are under development, with inspiration from the content development process in task 5.2 Change the House

## Identified problems and deviations from the work plan

Prioritization of the development of the Content Guidelines (D5.1) and the content development in relation to task 5.2 Change the House in order to prepare for timely production of Actions resulted in a number of overdue deliverables in late autumn of 2018. Corrective actions have been taken, and all pending deliverables have been submitted, except for deliverable D1.2 and D4.3, that will be submitted in the very near future.

## 2 Progress on milestones

Milest. no.	Milestone title	Delivery date in Annex 1	Means of verification	Achieved	If not achieved, forecast date	Comments
MS1	Project details designed	30/04/2018	Kick-off and handbook WS held	YES		
MS2	Project visual to media	31/05/2018	Website established and launched	YES		The target for the project website will be mainly scientific and academic interests. When the platform is ready for users, the project website will also include information meant for the media.
MS3	Action formats agreed	30/06/2018	Agreement at e-consortium meeting	YES		

### **3 Consortium management in the period**

#### **Coordination activities**

In this period, the project coordinator has supplied the consortium with file-sharing infrastructure to supplement the email communication between the partners. All the partners have access to the ECO2 group on SharePoint, where they can upload, access and work on documents and other files related to the project. With input from all the WP leaders, a project handbook has been produced, which specifies the planning of the different tasks. It specifies the details of the responsibilities and work split of the tasks and subtasks, as well as the interdependencies.

#### **Quality control**

All deliverables that submitted during this period were subjected to internal review among consortium partners. In addition, deliverable D3.1 (ECO2 action formats) and D6.1 (Segmentation analysis) were under external review by energy experts outside of the consortium. External review and tests will be used more extensively going forward, as the feedback is critical to ensuring that the platform and its content is relevant to the users. The advisory panel will be used for quality checks when relevant.

#### **Consortium meetings**

The first three physical consortium meetings (CM) have been held during this period. At the kick-off meeting in Denmark the main objective was to detail the plans of the project. The second CM was held in Finland and was mainly dedicated to further developing the action formats. The third CM took place in Bulgaria and was centred around action content development and review of platform version 1. The advisory panel attended the third CM, where the current work and the direction of the e-learning platform were presented for their feedback. The consortium partners frequently have e-meetings (on Skype or WebEx) in the task teams. In addition, the entire consortium has monthly meetings (first Thursday of every month) to present work, discuss progress and resolve administrative issues.

#### **Co-operation with other projects and programmes**

We have submitted ECO2 to a dissemination collaboration between eight related H2020 projects. We are currently writing an article for their newsletter and we will be added to the collaboration in the beginning of 2019. A list of the collaborating projects can be found on [www.proseu.eu/related-h2020-projects](http://www.proseu.eu/related-h2020-projects).

One of the advisory panel members is coordinating an Erasmus+ project also named ECO2. They have a very different approach and target groups but want to achieve the same objectives. We are currently working on how to exploit our similarities.

## 4 Progress of work plan in the period

<b>WP 1 – Management, Coordination, RRI &amp; Performance</b>	
<b>Key objectives</b>	<b>Progress</b>
Ensure compliance of the work with GA and consortium agreement	As project coordinator (T1.1), DBT is responsible for ensuring that the project progresses and delivers as planned in accordance with the GA. To do this, a project handbook (T1.2/D1.1) has been made which specifies the responsibilities and work split in the project, leaving no room for interpretation or misunderstanding of the work split and responsibilities of each involved partner.
Ensure project progress and results in accordance with the work plan and project objectives	DBT frequently checks in with the different partners, examining if the different tasks are being handled and the project progress in accordance with the project handbook and then the DoA.
Ensure high quality of project deliverables	<p>As a rule, the deliverables are internally reviewed by different partners in the consortium, providing feedback and amendment proposals before submission. A quality ensuring-mechanism has been implemented in the project handbook. Authors and reviewers will be listed on the first page of the deliverable.</p> <p>The ECO2 action formats (T3.1/D3.1) were in addition to being internally reviewed by DBT and ARC FUND also externally reviewed by three energy experts.</p> <p>Segmentation analysis (T6.1/D6.1) was in part made on the basis of country reports on energy consumption and energy consciousness in the partner countries. These reports were made by the consortium partners, and in order to ensure validity and quality, draft reports were reviewed by experts. The experts were later interviewed, and validity reports were made based on their statements.</p>
Facilitate coordination and knowledge sharing between the work packages	The project handbook (T1.2) underpins the coordination by specifying the work split and responsibilities of each partner, and by highlighting the interdependencies between (sub)tasks and deliverables both within and between WPs. The frequent consortium meetings (t1.3), both physical and web based, also support the coordination, as well as the knowledge sharing between partners.
Take care of the project's dialogue with the EU Services	As the coordinator, DBT is frequently in contact with the project officer.

## WP 1 – Management, Coordination, RRI & Performance

Establish an Advisory Panel to assist in maximizing excellence and impact	A diverse and knowledgeable advisory panel has been established. They attended the third consortium meeting in which they provided feedback on current work on the platform and the action content. As the project progresses, they will assist the consortium in showcasing the platform in their networks and/or to their members. Three of the AP members are from EU-countries that are not already represented by the consortium partners, meaning that they can potentially function as additional national nodes.
Monitor and assess performance indicators and impact	In this early period of the project, efforts are focused on determining how to best design the platform (T4.1) and structure learning content (T3.1/T5.1) so that the platform can gather the necessary data and information for properly monitoring KPIs and assessing project impact (T1.6).
Ensure RRI compliance, including but not limited to ethical behavior, proper data management, engagement with stakeholders, gender focus, and Open Access and Open Data policies	<p>We are ensuring RRI compliance by adhering to the H2020 research ethics guidelines, GDPR and several public engagement activities planned in the platform content's development process.</p> <p>On-going segmentation analysis of the platform users will reveal if there is an overrepresentation of a specific gender, and the communication plan is prepared to focus recruitment to even the scales. There will be an option other than male and female, when choosing gender for research participants.</p>
Ensure compliance with the 'ethics requirements' set out in this work package	<p>In D1.2, an extensive plan for how ECO2 complies with the H2020 research ethics can be found.</p> <p>D1.2 also includes a description of how ECO2 identifies and recruits research participants, how we will acquire informed consent and an ECO2 information sheet.</p>

### Progress regarding deliverables:

ID	Deliverable name	Month	Progress
D1.1	Project Handbook	3	Delivered and available only for members of the consortium (including the Commission Services).
D1.2 (+D9.1)	Ethics and Data Management guidance protocols (+ H- Requirement No.1)	4	This deliverable was affected by the transition of Karen Riisgaard leaving the project (and DBT) and Emil Sigbrand taking over. Steps have been taken to finish the deliverable, and it will be submitted early February 2019.
D1.4	Progress report 1	9	Delivered

### Adaptations to the work plan compared to Annex 1:

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## WP 1 – Management, Coordination, RRI & Performance

### Key upcoming activities until the next periodic report:

The next consortium meeting will be held in Vilnius, Lithuania in the period May 14-16 and hosted by KEF. At this event:

- The AP will participate
- Evaluate the pilotphase of the first two actions and consider possible adjustments to the platform and action content

## WP 2 – Communication & Exploitation

Key objectives	Progress
To produce a coherent and detailed communication and exploitation plan	The communication plan (t2.1) has been made by SINERGIE in collaboration with DBT, which describes communication goals, target groups, and the means to reach them, as well as the timing and responsibility of the different communication activities (T2.3 and T2.4). After this it will be a living document.
Support the branding of the project	The project website (T2.2) describes the project and its goals. In addition, relevant deliverables and publications will be put up on the project website to showcase the progress of the project. As the platform and content becomes ready for initial pilot testing, communication efforts (T2.3, T2.4 and T2.5) will be intensified to brand the project.
Raise awareness and ensure transparency of and public access to the results and on-going work	A link to the project deliverables on Cordis will be added to the project website. Additionally, selected public deliverables that help create awareness for the project will be made available for download on the project website when they are deemed ready by the project consortium, until they are published on Cordis.
Make use of social media to make instant communication from the project	Social media accounts for the project have been created and are ready for use. The stakeholders we wish to involve in the project at this stage are reached through different channels than social media. Our social media communication is primarily intended to recruit users for the ECO2 platform.
Communicate the process and results to the wider public	The communication towards the wider public will be initiated when the actions are ready for users.
To make use of existing networks to increase the outreach of the project	All partners were asked to propose candidates for the advisory panel (T1.4). In addition to giving valuable feedback to the project, the members of the AP are expected to help with recruitment and general outreach in their countries. The country reports in T6. mapped stakeholders that may be relevant to reach out to in T2.5, as they have an incentive to support the outreach of the project and the platform.

### Progress regarding deliverables:



ID	Deliverable name	Month	Progress
D2.1	Communication plan	5	Delivered.
D2.2	Project website	3	Delivered
D2.3	Communication package 1	4	Delivered
<b>Adaptations to the work plan compared to Annex 1:</b>			
<b>Key upcoming activities until the next periodic report:</b>			
Creating strategic recruitment material for the next communication package D2.4			

<b>WP 3 – Consumer Engagement Processes</b>			
<b>Key objectives</b>		<b>Process</b>	
Specify the processes of interaction in the consumer groups and between consumer groups and the consortium		N/A	
Develop consumer group (ECO2 Groups) processes, to be implemented in the ECO2 platform		N/A	
Establish a training scheme and online course for self-facilitation in the ECO2 Groups		N/A	
Set up a hotline function for technical as well a process problem solution, and for consumer feedback		N/A	
Establish self-managed support functions in terms of a use community		N/A	
<b>Progress regarding deliverables:</b>			
ID	Deliverable Name	Month	Progress
D3.1	ECO2 action formats	6	Delivered
<b>Adaptations to the work plan compared to Annex 1:</b>			
<b>Key upcoming activities until the next periodic report:</b>			

## WP 4 – Online ECO2 Platform

Key objectives	Progress
<p>Provide an online platform that provides all membership management functions, serves the ECO2 Groups with instructions and content for the ECO2 Actions, and gathers feedback, results and information from the Groups</p>	<p>The platform's functions are ready. Read below for a deeper explanation of the platform functions.</p> <p>The content for the ECO2 actions is still under development, with testing on users to begin in February 2019.</p>
<p>Adapt the existing EngageSuite platform to provide the functions needed</p>	<p>The existing and tested V1 functions of the platform, mentioned in the DoA, are as follows:</p> <ol style="list-style-type: none"> <li>1. Consumers should be able to 'subscribe' to become part of ECO2</li> <li>2. They should be able to identify ECO2 Groups and join Groups open for new participants</li> <li>3. They should be able to join meetings of their group</li> <li>4. The consortium/managers can set up agendas and information materials for sessions</li> <li>5. ECO2 Groups can themselves select sessions;</li> <li>6. And start the session agendas</li> <li>7. Members can answer questionnaires, evaluations, monitoring questions, policy suggestions etc.</li> <li>8. Provide calculations in embedded models. This includes visualization of calculation outcomes.</li> <li>9. Managers are able to translate the full platform</li> <li>10. National Nodes access to make Actions/sessions specifically for one country</li> <li>11. Export of data</li> </ol> <p>Further, the following functions have been implemented (T4.1), which add to the functionality of the ECO2 offers, but which were not described in the DoA:</p> <ol style="list-style-type: none"> <li>12. The platform has now a grid-system for visual layout of the Actions. This will highly improve the user experience.</li> <li>13. A seamless shift of users between PC/Pad/SmartPhone has been implemented, meaning that the Action manager can decide formats that work for all devices, with mobile phone being the default. This means that if the manager does not develop for all devices, then an Action will always work on a mobile, and on PC/Pad the Action will look as it looks on the mobile. This ensures that mobile users always can use an Action, no matter the decisions made by the Action designer.</li> <li>14. It has a design function, which means that a full action can have a "style" or a "theme", but that single elements can get special designs. The design includes backgrounds, lines/frames, types, fills etc., as are known from e.g. powerpoint.</li> </ol>

Train the national nodes to make them use the platform	The first part of the training (T4.2) was initiated at the 3 <sup>rd</sup> consortium meeting: The platform was presented and demonstrated to the current national nodes (consortium partners and advisory panel members) at the third consortium meeting (T1.3). The next step is to produce tutorial videos and make them available on the project website for current and potential national nodes.
Translate the platform to all involved languages	The EngageSuite platform already features a built-in module that allows managers to translate the whole platform easily. This has also been demonstrated to the current national nodes (the consortium partners and advisory panel members) at the 3 <sup>rd</sup> consortium meeting in Sofia, Bulgaria. Next step in the training of national nodes (T4.2) is to develop a video that shows how to use the module to translate the platform. The video will be available on both the project website and the platform, as well as in the recorded national nodes training webinars (D4.3).
Management and maintenance of the platform; adding ECO2 Actions as they are being developed	We are currently adding content for the first ECO2 action – Change the house. The platform is working as intended and no issues have been found.

**Progress regarding deliverables:**

ID	Deliverable Name	Month	Progress
D4.1	Online platform 1 <sup>st</sup> version	6	Version 1 of the ECO2 platform was presented to the consortium and the Advisory Panel, together with a fundamental demonstration/training to the back-end of the platform, at the Consortium Meeting in Sofia 28-29 of November 2018. Both the Advisory Panel and the Consortium expressed satisfaction with the platform.  To demonstrate the functions mentioned above a demonstration Action has been made. The link has been supplied in deliverable 4.1.
D4.3	Recorded national Nodes Training webinars	8	DBT is currently working on a video that shows how to use the translation module while SINERGIE makes a video on how the national nodes are expected to support with the recruitment of potential users to the platform. The internal deadline for the videos has been set to the first week of February 2019. Shortly thereafter, these videos will be included in the first national nodes training webinar, which will be recorded and submitted as the deliverable.

**Adaptations to the work plan compared to Annex 1:**

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**Key upcoming activities until the next periodic report:**

Online platform full-scale (D4.2):

The following functions are partly developed and are planned to be part of version 2:

- 14) Members can input and update their personal action plans. Only missing function is to link elements of their action plans, so that they can be updated in a new session. This is work in progress and has no delaying impacts.

15) The “variables” for models/calculations have been implemented in a way, so that they can also be used for cross-referencing across the platform. This e.g. means that the user can be sent to a specific place in the Action, depending on the answer the user gives. E.g. if the user answers, “yes I have understood this and wants to take action now”, then the platform can send the user to the Action Plan session. All fundamental elements of this have been made, and the specific back-end interface for the managers is being developed.

All in all, version 1 already has some functions, which were planned for version 2, and some additional functions for increased user experience.

Minimum plans for version 2 are:

- 16) Fine-tune backend for better usability
- 17) Improve the visual representation of results, e.g. of diagrams etc.
- 18) Implement more model/calculation solutions, based on the basic coding done for point 8 above
- 19) Make solutions (API and specialised webpages) for communication between the website and the platform, so that;
  - a. results, statistics etc. can be presented on the website for non-users
  - b. KPIs – both at user-level and cumulated - can be shown on the website
  - c. Users can login at website or in the platform as they prefer

## WP 5 – Thematic Content Production

Key objectives	Progress
Provide guidelines for design of content for the action ladder, and for different segments of consumers	These content guidelines (T5.1) are still in the process of being made. This is done simultaneously with the development of the platform (T4.1) and the first thematic action content (T5.2)
Make thematic actions, including; <ul style="list-style-type: none"> <li>○ Balanced, correct and action-oriented information on each theme, split for use in Sessions</li> <li>○ Information, specifically selected, prepared and narrated for the steps on the action ladder</li> <li>○ Design information and process to be attractive to follow for the users</li> <li>○ Promotion of the Actions</li> </ul>	A version of actions ready for testing has been created for the first thematic ECO2 action “Change the House”. In February, user testing will begin, and we will focus on getting feedback on the action’s ability to motivate, to teach about complex subjects and general functionality of the platform.

Design each thematic Action and its sessions according to the Storyboards from WP3	The structuring of thematic action content and its sessions are largely being developed based on the ECO2 Action formats (T3.1/D3.1). However, the content and session development is an iterative process, which influences the paradigm for the storyboards, based on the feedback loops in the production of actions.		
Prepare them, upload them and present them on the platform, to comply with Task 4.1	This is currently being done for the first ECO2 action “Change the House”.		
<b>Progress regarding deliverables:</b>			
<b>ID</b>	<b>Deliverable Name</b>	<b>Month</b>	<b>Progress</b>
D5.1	Guidelines for ECO2 process and content	12	The deliverable is still in the development phase. Drafts are frequently shared with DBT, as DBT is developing the first action content.
<b>Adaptations to the work plan compared to Annex 1:</b>			
<b>Key upcoming activities until the next periodic report:</b>			

<b>WP 6 – Consumer Segmentation &amp; Recruitment</b>	
<b>Key objectives</b>	<b>Progress</b>
Make a segmentation analysis to identify the needed resolution in segmentation and to identify volatile segments	The segmentation analysis (T6.1/D6.1) was conducted and written by UH. All consortium partners contributed by researching and writing country reports on energy consumption and energy consciousness in their respective countries. Its main purpose was to provide guidelines for consumer recruitment on the ECO2 platform, e.g. socio-demographic recruitment, knowledge-based recruitment, and motivation-based recruitment. In addition, the analysis provided valuable information about which segmentation measurements that should be contained in the platform. Some of the measures and background information will be gathered through a survey questionnaire for the subscription to the platform, others will be gathered as the participants go through the Actions and fill out information.
Provide segmentation to construct ECO2 Groups composed of different segments as well as mixed groups in order to allow for having Actions relevant for all participants in a Group	N/A

Perform segment research on the individual participants to support this analysis	The preparation for this has been done and can be found in deliverable D6.1 Segmentation analysis.		
Plan targeted recruitment of participants for the pilot phase	N/A		
Make distributed 'viral' recruitment for the up-scaling phase in order to expand fast and widely	A recruitment plan is currently under development by DBT and SINERGIE. The overall plan is that when a partner creates online recruitment material, it will first be discussed within the consortium at a consortium web meeting to ensure there are no cultural or national issues with the material. It is then translated and shared by all partners and national nodes in their national languages.		
Add to the number of involved nations	Through our advisory panel we now have potential national nodes from France and UK. Since we already have content in these languages, it requires little effort of the national nodes to participate in the recruitment processes.		
<b>Progress regarding deliverables:</b>			
<b>ID</b>	<b>Deliverable Name</b>	<b>Month</b>	<b>Progress</b>
D6.1	Segmentation Analysis	6	Delivered
<b>Adaptations to the work plan compared to Annex 1:</b>			
<b>Key upcoming activities until the next periodic report:</b>			

WP 7 (ECO2 Action Execution) and WP 8 (Innovation & Policy Outreach) have not been described in this progress report, as the related tasks and deliverable are not scheduled to be initiated during this reporting period. WP 9 (Ethics requirements) was described in the WP 1 progress description, as these are all related to D1.2 (Ethics and data management Guidance protocols).

## 5 Progress regarding performance indicators

For this first period of the project, it is too early to meaningfully assess how the project is doing in terms of the project specific indicators and common performance indicators. The KPI's and expected impacts of ECO2 are mostly centred around the platform and its users (e.g. number of countries and people engaged, number of Actions and decisions taken, Primary energy saved, and RES installed). As the platform and its Action content is yet to be finished and the recruitment process has not been initiated, the score for all indicators are currently zero.

The content and platform will be ready and delivered before the end of the second progress reporting period, and it will then be possible to properly determine the performance of the project based on the indicators.

## **6 Use of resources**

During this reporting period, the consortium partners have collectively used about 60 person-months, which is a little under  $\frac{1}{4}$  of the total allocation of person-months (259,05). As the first 9 months corresponds to  $\frac{1}{4}$  of the total project period, the use of resources can be said to approximately match the initial allocation. Additionally, there have not been any major unforeseen expenses during the reporting period either.