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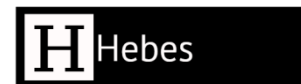
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## EXECUTIVE SUMMARY

ACT4ECO (<https://act4eco.eu/>) is an action-oriented online learning platform consisting of 21 different actions that provide information on energy efficient household practices ranging from reading electricity bills to more demanding actions such as planning and carrying out energy renovations, and ultimately producing their own household energy. ACT4ECO platform was launched in May 2020 and the upscaling measures and the use of the platform were monitored between May and September of 2020.

This deliverable D6.2 (ECO2 Recruitment) is a part of Work Package 6 of the ECO2 project that is divided in three parts: Segmentation analysis (6.1), Targeted recruitment (6.2) and Upscaling of recruitment (6.3). The upscaling process here under scrutiny is based on the knowledge about consumers and stakeholders obtained in the Segmentation analysis, and the project communication plan (D2.1). The initial upscaling strategies were elaborated in a series of Upscaling meetings among partners, where communication materials for user upscaling were designed and developed collaboratively.

The aim of this report is to describe the upscaling process in detail, whilst paying attention to how the partners' upscaling strategies and their execution differ by country context. The first part of the report reviews the different upscaling strategies; the second part reports on the strategy execution in terms of contacting different stakeholders and reaching out to potential users in the light of the stakeholder log and platform visitor statistics; and the third part presents ECO2 partners' reflections on the, the lessons they learned during the process and the further developments they plan for the upscaling.

The report aims to reach audiences who promote energy awareness such as organizations in all sectors working at the intersection of themes such as energy use, energy efficiency, and environmental protection. The report provides a story of the many steps taken in the journey of promoting an e-learning platform to user groups who would find it useful. The findings in this deliverable support the consortiums' future interventions in building and raising energy awareness, yet they may also serve platform development in other sites of consumption, too.



## INTRODUCTION

The Horizon 2020 funded Energy Conscious Consumers (ECO2) project aims to improve consumers' energy efficiency through learning processes supported by the ACT4ECO platform. The upscaling phase of the project concentrates on engagement of both stakeholders and consumers in order to build the platform's user base. The target is to recruit a diverse sample of consumers above 18 years old. The goal for each partner is to recruit 1,000 users for the platform in their respective country.

ACT4ECO is an action-oriented platform consisting of five themes that familiarize consumers with sustainable energy use and provide them with practices for residential energy efficiency. Action themes include the following: Become a smart consumer, Improve your home, Sustain efficient energy use, Produce your own energy and Manage your energy consumption. Each section consists of e-learning modules that assist consumers with improving their household's energy efficiency. The platform can operate as a learning environment for consumers who are already engaged and familiarized with matters of energy as well as for those who are interested and possibly in the need to learn more about energy efficiency. ACT4ECO was opened for users in May 2020 and the platform has been actively updated and improved throughout the upscaling phase of the ECO2 project.

ECO2 Recruitment has built upon previous work undertaken in the ECO2 project. National differences have been examined in a comparative study, as documented in Deliverable 6.1 Segmentation Analysis. For the analysis, each partner created and validated country reports on the energy consumer segments, promotion emphasis and potential partners facilitating recruitment within the national frame. To summarize the segmentation analysis, countries differ in their energy consumption not only based on climate and building stock features, but also based on individual consumption drivers such as attitudes, motivations, and knowledge. The Communication Plan outlined in Deliverable 2.1 outlined the communication goals, target audiences, and the means to reach them. The alpha version of the platform was tested by test users between December 2019 and February 2020. In these tests the contents of the platform were developed and modified on the basis of user feedback. The national upscaling strategy was informed by the knowledge gained during segmentation and communication planning, in that outreach efforts were carefully selected, planned, and executed.

This report focuses on the upscaling phase starting from the platform launch for the public. The report is divided in three parts:

**1) Strategy** part based on the communication plan of the project and the upscaling strategies provided by the ECO2 consortium partners. As mentioned, the communication plan describes the main target groups, communication strategies, and the means to reach them. To complement,



upscaling strategies outline the practical measures to be undertaken and describe the national characteristics that either accelerate or hinder the upscaling efforts within each national context.

2) Execution part based on logs of a) contacted national stakeholders and b) number of visitors on the ACT4ECO platform. This part of the report reflects on the differences between the national strategies and national campaigning in building the user base as informed in their self-reported logs of stakeholders.

**3) Reflection** part based on experiences so far and an outlook into the future.

The report is based on the user data from the ACT4ECO platform from Google Analytics, a log of contacted stakeholders compiled by ECO2 partners, and a self-reflective survey on upscaling also completed by the ECO2 partners. In the end of this report, we present the learnings from the upscaling phase.

## Part 1: Strategy

Upscaling strategies aimed at recruiting and engaging consumers to ACT4ECO platform. Overall, two factors are included in upscaling strategizing. First, an understanding of the overall communication strategy necessary to engage with the topics of energy consciousness and consumption; second – a national strategy, namely audiences, communications, and means to promote the platform in a country setting.

### 1.1 Communication plans

The Communication plan presented in Deliverable 2.1 provides an overview of the *target audience*, *communication strategies* and *communication tools* of the ECO2 project.

The target audience has been split in two types of stakeholders:

1. **community and stakeholders**, e.g. consumer organizations, environmental organizations, academia, authorities, retail, industry, etc.
2. **consumers and end-users**, e.g. local citizens groups or single interested individuals, policy makers, house owner associations, Facebook groups with an interest in home improvement, energy saving, sustainability



The *communication strategy* outlines the objectives, including supporting the branding of the ECO2 project; raising awareness and ensuring transparency of and public access to the results and on-going work; making use of Social Media to make instant communication on the project; communicating the process and results to the wider public; making use of existing networks to increase the outreach of the project; planning for further exploration of the project outcomes; supporting users' engagement in the project. Storytelling is emphasized in the strategy plan as means to present the content in a lighter, more engaging manner. When it comes to the communication tools, two major areas of communication have been identified, namely communication regarding the ECO2 project (<http://eco2project.eu>) and ACT4ECO platform (<https://act4eco.eu/about-us/>), respectively. There are some overlaps in the strategy, and further actualization is expected to happen both online and offline. Audiences for the ECO2 project are reached through websites, social media channels (Facebook, LinkedIn, Twitter, YouTube), videos as a medium and newsletters. Among offline tools, press releases and promotional material, such as posters and flyers are mentioned. Tools to communicate about the ACT4ECO platform include its website, social media channels with an emphasis on the five actions included in the platform and online advertising. Further, the communication plan covers tools to disseminate information about recruitment, policy briefs, events, network outreach and support community actions as well as guidelines for creating content plans and a visual identity.

## 1.2 National upscaling strategies

In their upscaling strategies, the consortium partners have listed stakeholders including government and business stakeholders, environmental and other NGOs, energy advisors and utility companies, research centers, locally active groups of citizens, and municipalities.

Homeowners form a significant target group in the upscaling strategies and upscaling plans suggest various stakeholders through which this group will be recruited. In addition to homeowners, students and senior citizens form important target groups in many of the participating countries.

Upscaling strategies state that partners will utilize both existing contacts to local and regional networks and, additionally, seek new ones in order to recruit consumers to the ACT4ECO platform. Partners will use social media channels to gain visibility for the platform. Upscaling was planned to occur by contacting desired stakeholders either in person, through emails or with the help of social media. Some of the partners have also listed press releases, articles, and suitable events as ways to amplify recruitment effects. Figure 1 summarizes national upscaling strategies in ECO2 partnering countries.





**Figure 1. Summary of national upscaling strategies for the countries involved in ECO2**

**Denmark's** upscaling had two segments: distributed rural perspective, with recruitment through learning institutions; and national perspective that actualizes with the help of academia and social media platforms. Denmark's communication plan focused on online efforts that were accompanied with a few face-to-face meetings. High income households in rural areas and homeowners living in detached houses were seen as significant targets groups. These user groups are reached through stakeholders within housing and environment.

**Ireland** strategized to focus on online networks in their attempts to recruit consumers. Means included social media groups, mailing lists and email invitations. If possible, during COVID-19, Ireland also planned to take part in some national energy related events as well. Ireland listed citizens, government agencies and businesses as well as NGOs and policymakers as their target groups.

**Belgium** planned to use digital tools for engagement. Belgium had also planned to utilize existing professional and personal networks and face-to-face meetings with stakeholders, provided that it will be possible post COVID-19. Types of media content for consumers included videos, images, tips, and quizzes. Targeted groups varied from homeowners with moderate energy literacy to people in vulnerable situations with low energy literacy.

**Portugal** strategized to use online communication and social media as main recruitment mediums. Online communication was planned to be used to activate possible consumers to the platform and create interest. Portugal's targeted groups were consumers aged 36-65 with a special attention to vulnerable consumers (low-income households).



**Finland** aspired to reach age and place specific social media groups (such as local Facebook groups) during upscaling. Online communication was planned to operate as the main means to activate and engage consumers. Due to high number of organisations operating in the field in Finland, the project partner planned to use carefully selected groups of stakeholders and consumers instead of haphazard advertising. Promotion of the platform was planned to be executed using content tailored to different target groups.

**Lithuania** planned to utilize both online and offline communication in their consumer recruitment. Lithuania aimed to build relationships through workshops and direct meetings with relevant stakeholders and raise awareness with various communication channels. These included Facebook, articles, and dissemination of the ECO2 platform through internal communication channels. The main focus was placed on targeting organisations and educational institutions.

**Bulgaria** strategized to use online forums and discussion groups as well as partnering organisations' websites to directly activate possible consumers. Bulgaria's offline communication was planned to activate stakeholders through events and utilizing existing networks. Upscaling had two categories -money saving and environmental benefits- according to which communication was to be tailored. Households, SME owners, and dwellers in municipal housing were considered relevant target groups.

**Greece** planned to use both online and offline communication to reach potential consumers and stakeholders. Facebook was considered the most relevant communication tool in social media. Face-to-face meetings (workshops and presentation) for promoting the platform were also planned. The groups targeted through social media were related to DIY and smart home solutions.

**Italy** aimed to recruit consumers through face-to-face meetings such as workshops in their upscaling strategy. Webinars and social media were planned to provide a multiplying effect for the recruitment and complement offline communication. Italy also showed adaptability to the COVID-19 development with a specific mention of linking their upscaling communication to the pandemic by utilizing the trending #stayhome hashtag. Italy planned to begin their upscaling with direct involvement of national nodes proceeding then to user recruitment through social media. Targeted groups included senior citizens and religious voluntary sector, for instance.

## Part 2: Execution

### 2.1 Upscaling strategies in practice

Based on the partner's survey, experiences with upscaling have been described as:

1. **Collaborative and promising** – for partners who have had contacts with some stakeholders who have been interested in collaborations
2. **Unstarted or delayed** – for partners who have struggled with practical challenges such as the interruption caused by COVID-19 to workflows, translation of contents and country adaptation, and availability of the finalized platform in the middle of the summer
3. **Challenging** – for partners who have contacted several stakeholders, for those who have used online communication tools exclusively, for those who received feedback on the technical shortcomings or contents

Without a shred of doubt, the global COVID-19 pandemic has affected all partners' upscaling efforts. Interestingly, while everyone switched to a predominantly online strategy, some felt it hasn't altered their strategy too much, while others felt it compelled them to adapt theirs. Three partnering countries (Finland, Bulgaria, Lithuania) reported that their strategies have not changed significantly compared to the initial plans, while another two mentioned adapting and evolving their strategies to emphasize more their online presence (Belgium, Ireland). During the testing stages and before the pandemic outbreak, some of the partners managed to arrange face-to-face encounters with users and/or stakeholders. Due to the lockdowns, the majority of the outreach has focused on online outreach, namely through social media, emails, phone calls, virtual meetings. In the partner's experience, it has proven effective to utilize several channels, e.g. email first and follow-up with a virtual meeting.

Most of the partners mentioned that the target groups and contacted stakeholders have remained quite stable and that what has changed was the way in which these stakeholders were approached. In Belgium for instance, an increased usage of emails took place which was not among the main outreach methods listed in the communication strategy. Changes in strategies also included a redefinition of the key stakeholders. In Denmark, the focus has shifted to industry and NGO partners to ensure long term collaborations rather than immediate upscaling. In Greece, re-prioritization and definition of discrete stakeholder groups is underway while previous collaborations have been revisited.




## 2.2 Timeline for the upscaling

The contents for the ACT4ECO platform were finished in March-April 2020. Translations of the materials into different languages depended on individual project partners' efforts.

Most of the partners started the upscaling phase in the beginning of May 2020 as soon as a beta version of the platform was in use and some of the contents were in place. However, from the partners' viewpoint, the platform was at the time not ready for upscaling. As follows, a specific challenge was to be able to communicate that the platform was not a finished product while still being able to maintain the stakeholders' interest until there is a fully functional version of the platform. For this reason, some of the partners have – instead of promoting a finished platform – opted for a strategy to promote a beta version of the platform. Moreover, in some countries (Greece, Portugal) the promotion of the platform had to be postponed altogether for the same reason. Another substantial challenge in the beginning of the upscaling was the approaching summer holiday season.

## 2.3 Materials and means for upscaling

A general strategy for upscaling has been the customization of content/message to a specific group of stakeholders. In particular, because the online communications have been central, **visual materials** have been used extensively in promotion, including photos, interactive images, videos, presentations (see Example 1). One partner mentioned that creating engaging visual content was an easy step during upscaling. Simultaneously, promotion **materials as text** (see Example 2) have been created, the likes of concept notes and newsletters (Denmark), articles in media outlets (Ireland) or articles in newsletters of partners and stakeholders (Portugal), academic conference materials (Ireland) and emails to name a few. Translation of content and an emphasis on understandable language have informed the communication during upscaling particularly in Italy, Finland, Bulgaria, Greece. Partners have also created events to promote the platform and then used social media groups to advertise them (Denmark) or attended public events (Ireland). The storytelling approach mentioned in the communication plan has diffused somewhat during execution; however, the interactive images used also convey information in an engaging manner to users.



**Example 1. Sample of visual content used in upscaling**



Mitä on energiatehokkuus  
kylpyhuoneessa?



## Pää pyörällä kesästä? Vai onko kyseessä sittenkin sähkölaskusi?

ACT4ECO on oppimisalusta, jolta löydät tietoa sähkön laskutuksesta  
sekä siitä, miten sähkölaskua voi pienentää.

Kirjaudu alustalle osoitteessa [act4eco.eu](https://www.act4eco.eu)



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## Example 2. Sample of text content used in upscaling (direct message sent to contacts, newsletter)



Most partners have used Facebook (<https://www.facebook.com/Eco2project/>), LinkedIn (<https://www.linkedin.com/company/act4eco/> <https://it.linkedin.com/in/act4eco-italia>), Twitter (<https://twitter.com/act4eco?lang=en>) and Instagram (see Example 3) as preferred communication channels, with post frequency ranging from once a week (Lithuania, Greece, Ireland) to twice, three

or even four-times per week (Italy, Belgium). The Irish partner posted news also on their organization's website, research groups social media platforms, as well as internal communication channels. Posts have been created both individually as well as shared through the partner organization's social media channels of the official ACT4ECO content.

### Example 3. Social media sample posts



**Sinergie Reggio Emilia**  
18 June · 🌐

In occasione della Settimana Europea dell'Energia Sostenibile #EUSEW2020, Act4Eco organizza un evento online per invitarvi a scoprire come risparmiare energia e diventare un consumatore consapevole. 🌍🌱

👉 Obiettivo: migliorare i livelli di efficienza energetica nella tua abitazione e nella vita quotidiana.

#ACT4ECO è una piattaforma di e-learning gratuita rivolta a tutti i consumatori di energia, e costituisce il principale output del progetto europeo ECO2 (Energy Conscious Consumers), finanziato dal programma Horizon2020. SINERGIE è Partner del Consorzio di ECO2

>>> ISCRIVITI ALL'EVENTO! 📢📢📢

Act4Eco in EU Sustainable Energy Week!

Entra nella piattaforma: <https://act4eco.eu/?lang=it>

#EnergyDay #energia #EfficienzaEnergetica #evento #online

**ACT4  
ECO.**

IS HOSTING

AN ENERGY DAY!

**SUSTAINABLE  
ENERGY WEEK**

#EUSEW2020

WED, 24 JUN

**Act4eco partecipa a EUSEW 2020**

Online event

★ Interested

 Federica was interested



**Act4Eco**17 June · 🌐...

Viewing: English •

ACT4ECO is hosting an Energy Day in the context of EUSEW (European Sustainable Energy Week). Due to the current Covid-19 situation, it will be an online event and a great opportunity for you to take action for our planet.

How? By going through ACT4ECO Actions and discovering how you can make a difference by improving your home and learning some best practices to apply in your everyday life.

Don't hesitate to take part in the challenge, subscribe here:  
<https://www.facebook.com/events/1059326974508655/>

#ACT4ECO #SaveEnergy #EnergyEfficiency #EUSEW2020 #EnergyDay #H2020EE



#EUSEW2020

WED, 24 JUN

**Act4Eco - EU Sustainable Energy Week!**

Online event ★ Interested

 Daniela, Delia and 3 friends

33  
People reached

1  
Engagement

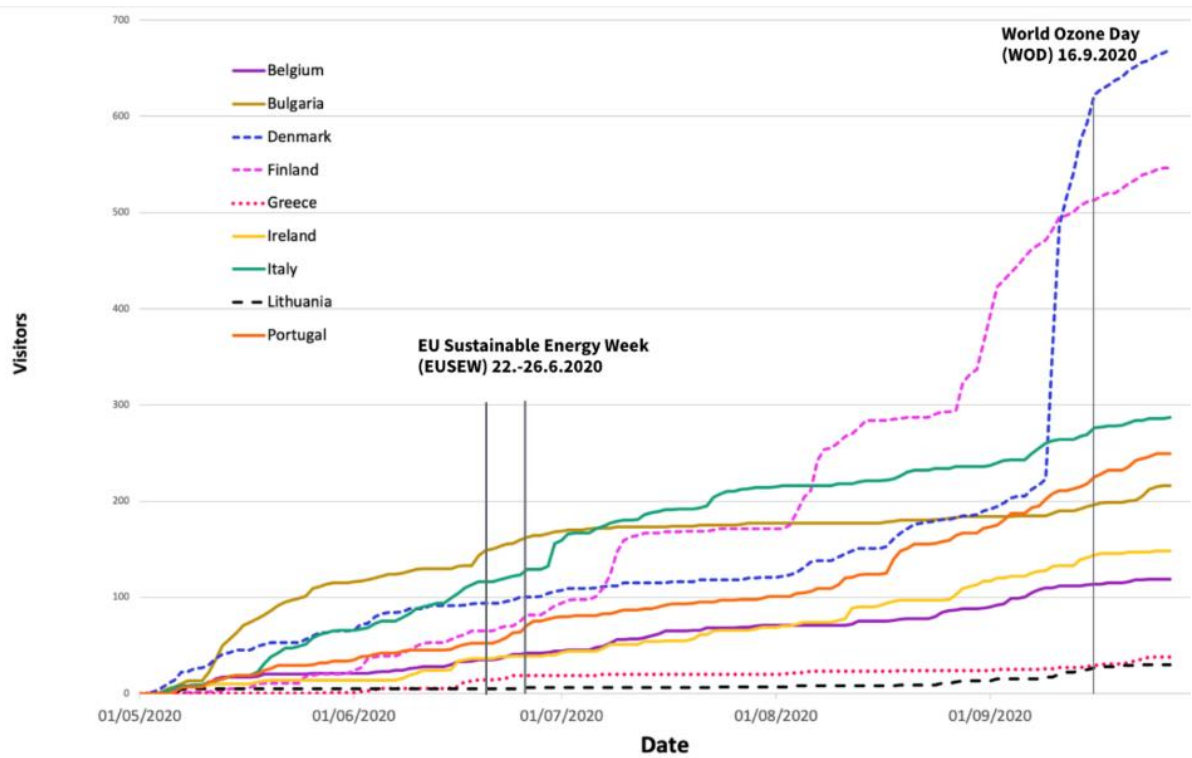
So far, the most important social media events for the upscaling have been the EU Sustainable Energy Week which took place in June 22<sup>nd</sup>-26<sup>th</sup> 2020 and the World Ozone Day (WOD) on September, 16<sup>th</sup> 2020. These two events involved consortium-wide efforts. For the EU Sustainable Energy Week, the communications were led by the Italian project partner (see Example 3). A number of social media postings were translated into the project partners' native languages and posted on Facebook, Twitter, and LinkedIn. The ECO2 project arranged a Facebook webinar to celebrate the World Ozone Day (recording of the live streaming available at <https://www.facebook.com/Eco2project/videos/1631362230361>). In the WOD event, the Danish and Lithuanian partners had planned training sessions to the use of the platform. The event was targeted for professional networks and meant to gain visibility for the platform and the project.

## 2.4 Number of visitors on the platform

According to Google Analytics data, by 27.9 there had been 2784 visitors on the ACT4ECO platform, 82.7 per cent of whom from consortium partner countries (Table 1). A visitor is defined here as someone who visits the platform but may not necessarily sign-in to browse the actual contents of the platform. The number of visitors is distributed between the countries as follows:

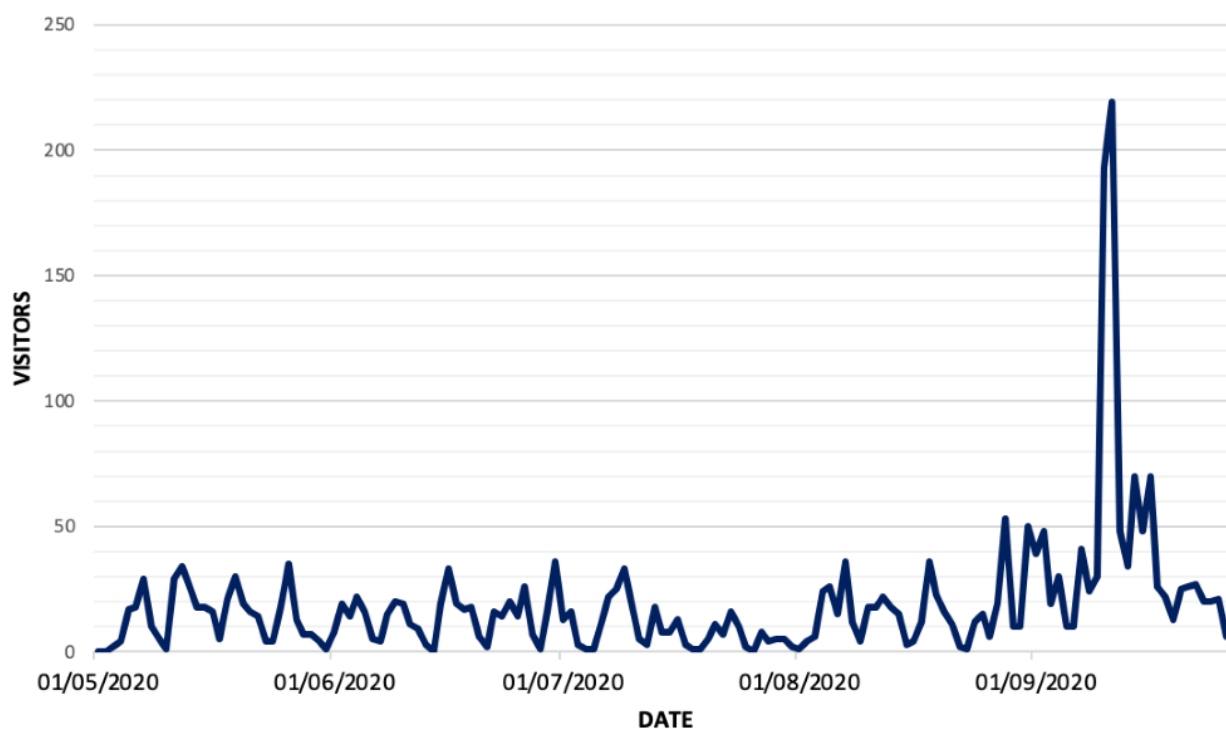
**Table 1. The number of visitors on ACT4ECO platform by location**

Country	Number of visitors	Per cent of total
Belgium	119	4,3
Bulgaria	216	7,8
Denmark	669	24,0
Finland	546	19,6
Greece	38	1,4
Ireland	148	5,3
Italy	287	10,3
Lithuania	30	1,1
Portugal	249	8,9
Other	482	17,3
<b>Total</b>	<b>2784</b>	<b>100,0</b>

**Figure 2. The number of visitors on the ACT4ECO platform by 27.09.2020 (data: Google Analytics)**

Upscaling efforts can be seen in the number of visitors in some countries. Following the EU Sustainable Energy Week campaign in Italy and Denmark saw small increases in the number of visitors. Also, the promotion of World Ozone Day before the 16th of September event can be seen in the number of visitors around that time in Denmark, but also in other countries, as the number of users on one single day was around four times higher than ever before. Around the time of the event, approx. 800 individuals visited the ACT4ECO website. The substantial increase is a result of collaboration with the UN Environment Programme Ozone Secretariat. As a result of this collaboration, NGOs shared the event internally reaching both danish and international audiences (Figure 3).

**Figure 3. The number of daily visitors on the ACT4ECO platform**



## 2.5 Contacted stakeholders: number and type

Planning the upscaling phase of the project beforehand made the recruitment of users on the platform and communication related to it more cohesive and organized.

In ECO2 project, the promotion of the ACT4ECO platform was originally planned on the basis of so-called 'national nodes'. National nodes are project partners and stakeholders (for example consultancy companies, consumer protection associations, energy agencies, environmental associations, neighborhood associations, and think tanks) that can assist in contacting relevant user


groups. In the project plan it is stated that varied stakeholders will help to “translate the platform and actions, facilitate pilots, and recruit consumers.” In the course of the project, the platform launch was delayed and face-to-face contacting strategies were altered. This caused a specific challenge for establishing partnerships with different organizations as well as user recruitment.

The communication on the upscaling within the ECO2 consortium was built on an upscaling workshop hosted by the coordinator DBT on April 7th 2020. In the workshop, national upscaling strategies were drafted and reviewed, and synergies between different partners were sought. The workshop was followed by monthly meetings between the partners where topical issues related to upscaling were discussed.

In terms of communication with the stakeholders, the Italian partner Sinergie coordinated the ACT4ECO social media presence. In practice, this meant the creation and management of news items targeted for different audiences in their native languages, which were to be posted on the Facebook and LinkedIn webpages of individual partners on as well as the ACT4ECO pages on all social media accounts.

When asked what has been easy or successful in the upscaling strategies, 7 partners have mentioned that reaching out to stakeholders has been easy. After an initial mapping stage that aligns interests to the ECO2 project, contacted stakeholders have been interested and curious in potential collaborations. Three partners have approached stakeholders in the hundreds: Belgium (315+ by email + 100+ on social media), Italy (140 organizations contacted either by email or on LinkedIn, including NGOs, citizens’ organizations, societies dealing with renewables / energy efficiency / sustainability, funding and welfare associations; 300 private messages sent on LinkedIn), Finland (193 social media groups + 66 organizations covering 621 contacted local/ regional organizations). On the other hand, Lithuania and Bulgaria have contacted below 10, Portugal below 20, Greece over 50 and Ireland 70 stakeholder organizations. Denmark has built collaboration with substantial danish and international stakeholders and a number of social media groups (+50 groups with an interest in green consumption and energy issues).

**Belgium:** The Belgian partner has contacted 268 different stakeholders. These stakeholders include 42 governmental authorities, 15 NGOs and 14 SMEs and 3 consultants, and one policy advisor. In addition, 38 individual stakeholders holding a position as a project manager, project leader or a program officer were contacted. Most of them share an interest towards environmental and energy issues. In the field of research, 6 universities, 3 research projects, 3 professors and one research center have been contacted. Moreover, among the contacted actors working in the field of energy, there were 4 energy advisors and 3 energy providers. Characteristic of the Belgian upscaling is that also 139 qualified PV installers that were approached via email.



Outreach has had three more active phases: on the 24th of June 27 members of citizen-led initiatives and six different organizations were approached in the context of campaigning for the EU Sustainable Energy Week. Most other organizations including the governmental authorities on the contact list were contacted in the end of August, and the PV installers in the beginning of September.

**Bulgaria:** The Bulgarian partner had the pilot testing of the platform in the end of May and beginning of June 2020, which explains the high number of visitors in this period. From July onwards, due to the holiday season and the fact that the platform was still not fully functioning in Bulgarian (and therefore was not actively promoted among the wide public), there were not that many visitors. A new boost of visitors is expected from September onward, when the academic year starts, people go back to work and the platform is fully functioning.

The Bulgarian project partner has been in contact with six organizations so far: 2 universities, 1 local media, 1 student organization, and 2 NGOs. They were contacted through e-mails and phone calls. The contacted stakeholders expressed their willingness to assist in promoting the platform through their contact lists only later in the fall. The delay is explained by translation challenges, since at the time of contacting the stakeholders the registration could be done only in English. As a result, the stakeholders insisted to postpone the promotion of the platform to the wider public until the registration is working in Bulgarian. That would ensure inclusion of all kinds of citizens, not just English-speaking ones. A few relevant Facebook groups were contacted as well, but unfortunately the rate of the positive replies towards collaboration on promoting the platform were quite low with most of the contacted groups not replying to promotion inquiries.

The upscaling strategy of the Bulgarian partner has a particular focus on engaging students and universities. So far, representatives of two universities in Sofia were contacted through phone calls. They were positive about future collaboration on promoting the platform to students. Once the universities have clear agenda about how the new academic year is going to happen due to the COVID-19 crisis, they will discuss together with the Bulgarian partner possible ways of promoting the platform. The initial plan is to promote the platform in front of students during relevant courses (face-to-face or online) or to give an assignment to students related to the platform - especially in energy or environment related courses, ask students to go to the platform and investigate ways to become more energy aware and to learn how to save energy. Lecturers could also organize discussions on what students have learned from the platform after the students have explored the content.



The platform was actively promoted through a Facebook group for Bulgarian users of ACT4ECO that was created by the Bulgarian partner. By September 2020 the group has 62 members and the number is expected to increase significantly by the end of the year due to active promotion. Information about the platform was posted regularly on the page, informing followers about future events organized by the project consortium (Sustainable Energy Week and World Ozone Day) and inviting them to participate, sharing information about the topics on the platform and organizing polls.

**Denmark:** So far, the Danish upscaling has proceeded steadily. The Danish partner and coordinator of the ECO2 project DBT has so far reached to 15 danish organizations and a broad list of social media groups. The list of contacted organizations is balanced, so that four of the organizations are large manufacturing companies producing construction technology, three organizations within the field of governance and three NGOs working in the field of environmental preservation. Additionally, there is cooperation with one substantial R&D actor, one energy advisory body, and a large power company. With two of these organizations, further collaboration has been agreed upon. The selection of these organizations has been done according to their interest in the content and platform as well as their audience reach. The danish partner has been the only one mentioning promotions as part of their social media outreach.

In September, the number of danish visitors on the platform experienced a substantial increase. This was because of the World Ozone Day social media campaign, where the danish partner DBT invited important stakeholders and collaborators. Two of these organisations communicated about the event internally. UN Environment Programme (UNEP) participated in the event by sharing the ACT4ECO tool on their website. Moreover, 38 Facebook groups with interest in sustainability, climate issues, and green energy were approached. As a result of these efforts, the World Ozone Day webinar that was livestreamed reached an audience of 1800 viewers. By comparison to traditional advertisements, organizing live streaming webinars proved most efficient strategy in reaching potential users.

**Finland:** Upscaling in Finland started in the beginning of June, through approaching of a few Facebook groups and governmental actors, that seemed relevant for the platform as potential users. In the beginning of the upscaling, the organizations and associations approached consisted of environmental organizations and Facebook communities with interest either in environmental issues or energy.

During upscaling, altogether 193 Facebook groups were directly approached. 73 of them responded positively to the request to post our advert to the group, 120 of them never replied, and 10 of them refused to report the advert. These groups had different interests: 3 of them focus on energy, 9 renovations, 7 environment and climate, 1 citizen action, 69 regional issues, and 6 something other.





Besides contacting Facebook groups, 621 e-mails were sent to different organizations related to energy and housing, organizations working on energy issues, energy companies, and other organizations working for instance on environmental themes or student affairs. Of the contacted organizations, 11 are housing associations or NGOs, 3 energy actors, 2 environmental organizations, 16 youth organizations (with a substantial number of sub-organizations), 6 senior citizen organizations (four of which have a number of regional sub-organizations), 5 governmental organizations, 1 consumer organisation (with a vast network of local organizations) and 6 other organizations involved in promotion of business, gender, and other issues. Moreover, we invited 28 energy experts to receive the ECO2 project newsletter.

The number of users experienced notable increase in four instances 1) in the first week of July, when a large number of local Facebook groups were asked to post an advert on their Facebook page, 2) in the first week of August, when the same was done with additional local groups, 3) after 11th of August, after approaching governmental organizations working on energy issues, and 4) in the end of August, when student organizations of different universities were approached.

**Greece:** Greek upscaling strategy initially focused on certain national nodes promoting energy conscious behavior. However, this strategy has recently been reviewed and updated questioning whether these organizations are adequate or share the same view when it comes to the systematical communication of project's goals and whether new communication channels should be added to further promote the platform. As a result, new additional actions have been developed in terms of identifying and reaching relevant target audiences, rebuilding official company accounts on social media and developing social media presence.

HEBES's revised upscaling strategy is user-driven and aimed at understanding of the users' motivation and priorities as well as possible commonalities between them and the project's priorities and goals. The means of contacting possible users included personal communication (phone calls, emails and follow ups), some face-to-face meetings and invitations to join their effort either as supporters or end users of the platform or even co-organize dissemination activities with mutual benefits. For facilitating the process, the Greek partner updated and strengthened its social media presence, rebuilding its official company accounts.

As an outcome the new list of contacts includes so far almost 30 different stakeholders: 11 of the named organizations are energy providers, 1 energy advisory organization and 1 utility company. In addition, there is 1 R&D company, 1 think tank, 3 national authorities, 3 non-profit organizations, 5 environmental organizations and 3 organizations representing the press. Recently some more organizations have been added, representing academia (1 private college and 1 national university), while contacts with sister projects have given positive first replies towards a future collaboration.





During summer, due to the summer holiday and the fact that ACT4ECO platform was not fully operating and functional, there was a short delay in further implementing the selected upscaling strategy. However, a new boost is expected from now on (end of September and on), owing not only to the strategic redirection of the national upscaling process but also to the finalization of the ACT4ECO platform, the translation of the content into the national language and the gradual return of stakeholders in their daily routines.

**Ireland:** In Ireland, upscaling was carried out by approaching a large number of community groups through social media. Most of these groups were NGOs with energy and environmental interests, but also regional groups and developing local communities were included. Other contacted actors include governmental actors operating in the field of climate and environment, local, regional and national energy agencies, R&D center / institute, one renewable energy company, consulting companies, and local and international media outlets. In addition, a number of national energy providers were contacted. The Irish partner also presented at a number of national and international academic conferences on the project and the ACT4ECO platform.

In addition to approaching organizations, potential users were also approached directly. Attendees in an event organized by UCC in September 2019 had given permission to be contacted once the platform was running. From this particular event held at UCC, 38 attendees were recontacted for the upscaling. In summary, the Irish upscaling strategy had a universal reach, with an outreach to users at all levels.

**Italy:** In Italy, energy stakeholders, institutions, and potential users were approached through ACT4ECO social media postings. Online recruitment was carried out on both private and public groups through Act4Eco social media profiles. In particular, national groups working on environmental issues, construction and energy renovations, energy efficiency, sustainable innovations and new production forms of sustainable energy (such as photovoltaics), were contacted both on Facebook and LinkedIn.

In the contact logs, there are approximately 140 different organizations listed. 16 of them are NGOs and citizen organizations, 16 organizations working on renewables, 13 organizations working on energy efficiency, 7 organizations with a focus on environment and sustainability, and 5 on funding and welfare. A specific feature in the Italian contact data is the large number of actors operating in consultancy and training (28 named) or project management (8 named), with most of them involved either in environmental or energy issues. Moreover, ministries and governmental actors, organizations operating in the field of construction, utility companies, and energy agencies were also approached.



Some of the campaigning of potential users was also conducted using the LinkedIn “Act4Eco Italia” profile, through which over 300 people were directly approached, proposing the subscription to the platform and a brief explanation of the project. The fact that the Italian partner took actively part in promoting the ECO2 project as well as ACT4ECO as a part of the EU Sustainable Energy Week (EUSEW), can be seen in an increase in the number of users on the platform occurring in the end of June.

**Lithuania:** In Lithuania, the organizations approached include four organizations operating in the field of higher education. In these organizations there is ongoing teaching on topics such as energy and engineering, and also on environment.

Additionally, two NGOs and two policy institutes have been approached as they already operate in the field of energy awareness and renewables use. These organizations are also already collaborating with NGOs and businesses and have prior experience of tackling energy questions.

**Portugal:** In Portugal, the implementation of the upscaling strategy has begun in the beginning of September as the platform contents have been translated and adapted to Portuguese reality.

The stakeholders approached during September 2020 include consumer organizations (including the Portuguese Consumer DG), several local, regional, and national energy agencies, two organizations operating in the field of renewable energy, three environmental organizations, and a think tank. These organizations are known former partners with whom DECO has cooperated in the dissemination of other projects.




### Part 3: Reflection

Upscaling and the success of consumer recruitment are influenced by several aspects. Regarding the recruitment of platform users, it is relatively easy to determine the national target groups which have been contacted during the upscaling phase. Contacting these groups is also quite effortless since contacting happens for instance through existing networks via email; this is neither too time-consuming nor resource demanding.

However, one of the obstacles related to upscaling especially in the social media environment is the fact that there are no guarantees that messages related to the ACT4ECO platform pass gatekeepers and reach potential consumers. In Facebook, for instance, moderators might not reply to approaching efforts or the advertisement concerning the platform does not create interest amongst users. For instance, the attempt to utilize the EU Sustainable Energy Week event in promoting the platform on Facebook was overall not that successful (see Figure 2).

The most relevant question concerning the recruitment is whether upscaling manages to attract consumers and encourage them to use the platform. This requires that the advertisements reach the targeted consumers but more importantly, that consumers register with the platform. One of the obstacles related to the upscaling is also how to prove the relevance and value of the platform to European consumers and stakeholders. Since the knowledge that the platform provides is quite general and reachable also through other sources, it is important that project partners manage to prove the platform's advantages to consumers and stakeholders. Engaging the most important targeted stakeholders, for instance energy advisors and utility companies, can be challenging since some of these actors produce and distribute similar materials and services themselves. The central question is how these stakeholders can be motivated to advertise the platform to their existing networks and their clientele.

Several issues were detected by partners when reflecting on the challenges encountered:

- First, aspects related to the platform were perceived as slowing down the upscaling, for instance its degree of readiness, the registration process or restrictions in terms of adding to the platform.
  - Second, insufficient information on the upscaling impact. The monthly metrics did not meet partners' upscaling needs. Partners expressed discontent about the lack of real-time data on the platform use, thus not knowing which conversion rates or impact their recruitment efforts had.
  - Third, collaborations with stakeholders and national nodes did not always yield expected results. Despite initial high interest towards the platform, some stakeholders stalled. A challenge was getting partners on board without showing indicators that the platform had
- 


high traffic. Moreover, getting stakeholders interested without suggesting additional activities, workshops, and materials proved difficult.

Other challenges related to the low conversion rate of registered users compared to partners' effort, motivating users to register on the platform and to complete the suggested actions, improving and reshaping the existing upscaling strategy.

Generally speaking, at the time of this report, nearly all partners considered the main unattained goal related to the number of users of their respective countries. This is either seen as a *cause* of unmet social media promotion efforts or *as a consequence* of the restrictions on organizing face-to-face events or meet in person. The fact that the community aspects have not been developed on the platform was found to hinder its improvement through feedback that could have been received.

### 3.1 Lessons learned

The project partners learned different kinds of lessons mainly based on their experience in the upscaling implementation. Some lessons have been **strategic**, involving adapting strategy to respond to the needs of the upscaling, how to promote a technology or the need to co-create with stakeholders and end-users early to ensure the platform is adapted to local conditions and needs. The need for a consortium-wide strategy that guides individual partners moving forward has also been identified. Addressing the upscaling strategy as long-term goals has also been mentioned: knowledge transfer across Europe and strengthening collaborations with long term effects. Other partners have learned how to navigate an area where several established actors have raised energy awareness already and the novelty of contents like the ones on the Act4Eco platform is to be questioned. Lessons related to the **execution** have involved a sustained dialogue with approached partners as well as a results-based recommendation on engagement techniques.



**Figure 4. Progression of national upscaling strategies into execution**

	<b>Strategy:</b>	<b>Execution:</b>
Belgium	Stakeholder-focused approach with online and offline engagement elements	Stakeholder-focused approach (online outreach to a vast range of stakeholders and personal networks)
Bulgaria	Stakeholder-focused approach with online and offline engagement elements	Stakeholder-focused approach (university courses and lectures employing the platform)
Denmark	Mixed approach with extensive online elements, directly approaching users through SoMe	Stakeholder-focused approach (collaboration with industry, NGOs, gov. org), creation and promotion of SoMe events
Finland	Mixed approach with direct outreach to local users online, collaboration with national stakeholders	Directly approaching users through SoMe groups
Greece	Mixed approach with stakeholders and consumers online and offline	Stakeholder-focused approach with contacting energy sector actors and existing connections
Ireland	Mixed approach with national stakeholders, directly approaching consumers online	Mixed approach with national stakeholders, directly approaching consumers online
Italy	Mixed approach with stakeholders and consumers including both online and offline engagement elements	Mixed approach with stakeholders and directly approaching consumers through SoMe groups
Lithuania	Stakeholder-focused approach with online and offline engagement elements	Stakeholder-focused approach with online elements
Portugal	Stakeholder-focused approach	Stakeholder-focused approach (outreach to professional networks)

Figure 4 offers a summary on how upscaling strategies in different countries have progressed to practice. While many initially envisioned communications regarding the upscaling both online and face-to-face meetings, due to COVID-19, the execution of the upscaling has mainly focused on digital communication in all countries. Generally, social media and digital communication have been used to activate consumers and citizens and to create engagement, whereas offline communication took place for few partners prior to the pandemic outbreak. In the context of ACT4ECO upscaling, offline communications also included outreach by phone. Social media channels were employed depending on the target audience. Facebook communicated to the general public, whereas Twitter was used to target press and stakeholders in addition to the general public. LinkedIn has been used for communicating to professionals and practitioners, researchers, and industries.

At large and given the digital push of the current pandemic, one of the lessons so far has been the recognition of value from search engine optimization (SEO) - original content in all consortium languages increases in importance as users who find the platform organically spend more time on it.

### 3.2 Plans for further upscaling

The project partners have many kinds of plans for further upscaling. The coordinator of the project, DBT, aims at strategically developing contents and services for stakeholders, such as developing relevant actions and potentially expand the content of the platform beyond the ECO2 project. The newsletter and collaboration on the platform beyond the ECO2 project are essential in this matter.

Other partners are more focused on the task of drawing more users to the platform within the scope of the current project, however, most of them want to expand the upscaling into specifically defined directions. Some of the partners see a strong role for companies and especially energy providers. The Italian partner Sinergie aims to develop collaboration with private companies, energy providers and energy efficiency experts to develop social media events for potential users online. In the end, the goal is to establish local user communities around the ACT4ECO platform. Similarly, the Greek partner HEBES aims at establishing periodic forums with community groups, in other words facilitated project events where communities are informed about the platform. HEBES also plans to develop a mechanism for ensuring accountability by nominating a designated employee with whom stakeholders can discuss their concerns.

Partners, such as the ARC FUND (Bulgaria) and KEF (Lithuania), have planned further strategies giving an important role to universities, NGOs and citizen organizations. In Bulgaria, the project partner has drafted plans for collaborating with the universities and NGOs to use platform contents as a part of teaching and citizen engagement events. They also have plans for involving consumer organizations and the media in doing so. In Lithuania, there is collaboration planned with universities to promote the platform to students. Moreover, the target is to contact more organizations and to plan collaboration with them, and also advertise the platform on the social media. Italian and Bulgarian partners also plan to reach out to organizations whom they had contacted previously.

In Portugal, upscaling efforts are taking place at the moment. At this point, preliminary contacts have been made to present the project, whereas a more structured campaign is planned for October/November. For this stage, direct emails and phone calls have been chosen as a means of contact. The stakeholders will be asked to spread information about the platform within their communities and within their educative and awareness raising initiatives in order to reach more potential users. These entities are also strategic for the evaluation of the platform and for exploitation of results. The efforts will be articulated and will create synergies with the social media efforts, like those already implemented during the World Ozone Day webinar, but also the actions learning modules available, bringing more users to the platform in the next months.



In Belgium, further collaboration is planned with citizen organizations. The results of the planned future workshops are meant to improve the ACT4ECO website and to catalogue ideas for its further development. Future events such as webinars are on the way in Italy, too. Further upscaling in Finland and in Ireland will be carried out in similar vein: the strategies in these countries are heavily leaning on contacting possible users online and providing interesting online contents for them.

## ASSESSMENT

The upscaling phase of the recruitment for the ACT4ECO platform was actualized in a narrow timeline with exterior challenges arising from the COVID-19 situation and the national policies implemented. This context inflicted limitations to upscaling in all countries taking part in the ECO2 project and revealed several critical points in the upscaling that should be taken into account moving forward.

In this report, we have covered at length partners' upscaling strategies and their execution. Similarly, we have detailed how each country dealt with the new imperative of switching to an entirely digital upscaling strategy implementation. All partners had to cancel in-person meetings, but the effects of this measure seem to have disproportionately affected some countries more than others. Another possible interpretation of the number of users is that at the time of the upscaling, people across Europe were consistently preoccupied about their safety and that of their families, and hence were less motivated to increase their energy awareness or undertake energy renovations. Nonetheless, observing the increasing adoption of technologies during COVID-19 coupled with a renewed interest in life at home, the ACT4ECO platform has momentum to attract many users from segments that are hard to anticipate at the moment. Altogether, adopting digital strategies in upscaling also creates pressure to adopt new digital tools for platform promotion and the need for automated processes with feedback loops in further developing the platform and its contents.

Important challenges to the upscaling were also related to the level of demand for the platform: in some countries, the level of energy awareness is high which is interlinked with the presence of a high number of stakeholders already promoting energy awareness, energy efficiency measures, and competing energy services. In this context, however, the public interest towards new learning material may be lower than in a context with few stakeholders operating in the field and little information available. In the upscaling process, the difference can manifest as challenges in reaching users and finding suitable venues for promoting the platform. Therefore, the upscaling efforts did not always produce optimal results in terms of the number of platform users despite significant effort.



The entire upscaling process relied at length on the upscaling strategies of ECO2 partner organisations responsible for the communications in the national contexts as well as the translation of the platform contents in national languages. What is of specific interest is that the most successful communications to promote the ACT4ECO platform were built in collaboration with 3 specific stakeholders. Organizing live-streaming webinars in conjunction with the EU Sustainable Energy Week and the World Ozone Day in collaboration with NGOs proved to raise interest in potential users. The involvement of relevant global stakeholders created a buzz beyond national borders, which is an important observation from the viewpoint of creating future interest towards the platform.

In order to reach users and have them engaged longer time on the platform, i.e. organic reach, two strategies might provide a successful way forward for the upscaling. First, following up on strategies proved effective and leveraging them across all counties (e.g. live streaming webinars, strategic partnerships, initial contacts by email/ phone and follow-ups with online meetings). Second, developing entirely new digital strategies. These can entail enhanced use of automated tools and social media. In the digital strategies, the ability to adopt digital design thinking as well as building inbound content with SEO are of essence for reaching users who would benefit from the contents the most. For instance, if someone is searching online on how to change isolation our action on isolation will be relevant for this potential user, at this specific time. This would mean that ACT4ECO becomes easier to find **when** a potential user is in need of the platform.

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## ANNEXES

### Annex 1. Attributes from log of stakeholders (in use from April 2020)

Attribute	Form
Contact date and response	Date, (yes / no / pending)
Organisation	[Name]
Sector	NGO / Citizen-established organizations / Community group / Consumer association / Energy company / Utility company / Housing association / Energy advisor / Energy agency (local, regional, national) / Research institution / R&D Center / Think tank / Business (large company, SME, startup) / Consumer protection association / Governmental, communal, regional authority / Social cooperative / Facebook group
Representative	[Name, contact]
Short description	[Open response]
Why participating	[Open response]
Website	[URL]
User segments	[Open response]
Notes	[Open response]
Signed up for newsletter	[y, n]

## Annex 2. Partners' upscaling survey questionnaire

1. Which partner and contact person is providing the answers?
  2. How would you evaluate the overall success of the upscaling phase in your country? [Please use 1 summarizing word to describe the upscaling phase, followed by a longer explanation]
  3. Each partner has created their own national strategy for the upscaling phase. How has the upscaling unfolded in regards to the originally formed strategy?
  4. If the upscaling strategy changed during the process, how has it changed?
  5. How many organizations did you end up contacting?
  6. What kind of advertisement materials did you use to promote the platform? How have you customized them to different stakeholder groups?
  7. Was there an emphasis on a certain type of national nodes in the upscaling strategy? How was that emphasis decided?
  8. What type of social media did you use for the upscaling? How frequently?
  9. What was successful and/or easy in the upscaling?
  10. What were the main challenges related to the upscaling?
  11. What feedback did you receive from the stakeholders regarding the platform? What about the project overall?
  12. Were there some upscaling goals you were not able to reach? Which ones? Why?
  13. What were the most important lessons you learned during the upscaling phase? Was there for instance something you could have done differently?
  14. When did you feel the platform was ready for upscaling? (e.g. month/ year)
- 

15. What plans do you have for continuing to promote the platform?

Submit

