Energy Data Innovation Network

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Abstract	This deliverable documents the recruitment efforts and support and capacity building provided to the public authorities. It captures the main communication streams, individual recruitment strategies and structure of training workshops.

Versioning and Contribution History

Version	Date	Modified by	Modification reason
v.01	15.11.2017	Christiane Thomas	First Draft
v.02	15.01.2018	Carmen Maier, Wolfgang Hofstetter	Second Draft, update and extension of text
v.03	29.01.2018	Xavier Marti, Darsh Chauhan, Graeme Stuart	Incorporating information from project partners which arranged already training sessions
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v.06	26.02.2018	Carmen Maier	Final version

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Executive Summary

The present document has been developed as part of the WP5 "Training and capacity building" and provides an overview of the EDI-Net recruitment and training activities until February 2018 (M24). The aim of this work package is to deliver support and capacity building to the public authorities.

WP5 is strongly linked to WP4 "Training material preparation" since the feedback from new enrolled partners about the training materials is used to improve them and provide answers. By sharing information and news about EDI-Net and bring the project publicity, WP5 is also connected with WP8 "Dissemination and Communication".

The EDI-Net approach was developed in three pilot cities or regions. The target is to engage another 40 public authorities until the end of the project. The latter public authorities should continue to test the EDI-Net system. At this stage of the project, there have been several recruitment activities. This includes both more general activities such as sending out the project newsletter or using project partner's newsletters for spreading information (e.g. eClimail of Climate Alliance) as well as more targeted approaches, for example networking activities with demonstrations and information desks at conferences.

Depending on the country the recruitment activities were quite diverse. In the United Kingdom, Leicester City Council approached its network ALEO East Midlands (Association of Local Energy Officers); in Spain the Regional Government of Catalonia invited stakeholders to attend a high-level political launch event to spread information. In both countries a training session was organised where interested public authorities were invited to gain a deeper insight into the operation of the EDI-Net tools and the potential benefits they can provide to a public authority's energy management. These sessions proved to be not only a training opportunity as originally anticipated but have also been used to talk to the public representatives in order to get them engaged.

Twenty-six public authorities have filled in the application form by February 2018, showing their interest in participating in EDI-Net. As of February 2018, five public authorities from United Kingdom have completed the data import check list. In Catalonia three public authorities have been enrolled.

1   Introduction

This deliverable describes the recruiting activities in the EDI-Net project in order to engage with public authorities. Participating public authorities are expected to have smart meter data ready to be analysed by the project team. A regular dialogue between the project partners and the participating public authorities is established to maintain their continued interest in the project. The deliverable covers

- a general description of how public authorities are approached and recruited (chapter 2)
- a more detailed description of the country-specific recruitment activities in the United Kingdom, Spain and Germany (sections 2.2.1 - 2.2.3)
- a general overview of the setup of the training workshops (chapter 3)
- a description of the two first training sessions in United Kingdom and Spain (sections 3.2.1 - 3.2.2)
- conclusions drawn from the experiences of recruitment and training sessions so far (chapter 4)

2   Recruitment of public authorities

Public authorities are continuously being invited to participate in the project. The aim is to enrol at least 20 public authorities in the second year and at least a further 20 in year 3.

Climate Alliance is responsible for the recruitment and is supported by the UK, ES and DE partners as well as supporters and other networks. The project partners, divided into three groups of pairs, target 10 to 15 stakeholders from public authorities. The distribution is as follows:

- CIMNE and Generalitat of Catalonia target public authorities from Spain, Portugal, Italy and France;
- DMU and Leicester City target public authorities in the UK, Scandinavia and Eastern Europe;
- Empirica and Climate Alliance target public authorities in Austria, Germany, Luxemburg and Switzerland.

The public authorities who were willing to engage and provide automatic meter reading (AMR) data were invited to participate in an EDI-Net training event. To keep the training event participants up to date and to maintain their interest we have been in regular dialogue with them, providing relevant information about the project. The participation of the public authorities in the training event is supported by a reimbursement of travel and subsistence costs.

2.1   General

There are five main approaches to contact new potential partners:

- the EDI-Net Newsletter (every six months)
- the Climate Alliance Newsletter eClimail
- participation in international events and conferences to demonstrate EDI-Net
- country and topic specific events (section 2.2)
- bi-lateral contact to known and third municipalities (section 2.2)

The EDI-Net Newsletter is based on TYPO3 software. Interested people can subscribe to and unsubscribe from it on the website. It is run under German legislation and uses the Double-Opt-in procedure, which means that after somebody has subscribed to the newsletter, they will receive an email with a link that needs to be confirmed. The EDI-Net Newsletter is available in English (currently 178 subscribers), German (currently 3,861 subscribers), Spanish (currently 103 subscribers) and Catalan (currently 278 subscribers).

The eClimail is a newsletter run by Climate Alliance, also governed by German law, and reaches around 4,500 subscribers in total. It is distributed in three different versions in two languages: for Germany (in German),

for German speaking countries (especially Austria, Switzerland, Northern Italy and Luxemburg) and a third version in English.

Additionally, we participate in national and international events and conferences, and distribute flyers at the events and speak with interested persons personally to promote EDI-Net to them (e.g. information desk at the Climate Alliance International Conference in 2016 in Krems an der Donau, Austria).

Since the EDI-Net tools (forum, dashboard, benchmarking) went public, we have been demonstrating these tools during the events. We also promote EDI-Net at supplementary events (e. g. at Energy Cities in Stuttgart, Germany 2017) or workshops (e.g. In-Situ Session No. 6 at the International Climate Alliance Conference in Essen, Germany 2017). To cover the technical knowledge regarding energy controlling for workshops – like the In-Situ Session No.6 – we usually asked our project partner from the pilot city Nuremberg for support.

2.1.1   Typical recruitment process

The first step to engage interested municipalities is to send them a recruitment letter together with a project flyer. These materials are available in English, German, Spanish and Catalan. Dissemination of the recruitment activities takes place on the EDI-Net LinkedIn account, the EDI-Net newsletter as well as the eClimail and Climate Alliance social media (Facebook, Twitter, LinkedIn). Additionally, members of Climate Alliance are contacted through phone and e-mail and asked if they are interested to join EDI-Net.

After a couple of weeks, prospective municipal partners are asked to fill in the application form (on the homepage, see http://www.edi-net.eu/en/service/application-form.html) if they have not yet done so. Once they have applied, they are sent a welcome email with necessary information (texts are available in English, German, Spanish and Catalan) together with a pdf file that gives a general overview of the EDI-Net tools (available in English, German and Catalan). Additionally we run the helpdesk as part of the website with a designated email address and phone number. For details regarding the helpdesk see deliverable D8.2.

The applicants are then asked to fill out the data import sheet to provide the EDI-Net team with all the information for the technical specifications of their buildings and meter systems. Municipalities which want to provide their data are asked to sign an acceptance letter (participation agreement), stating the rules under which EDI-Net and the municipality are working together. Figure 1 shows the overview of the recruitment process (please note that D6.1 has an updated version). All municipalities who filled in the application form were invited to the EDI-Net training workshops in 2017.
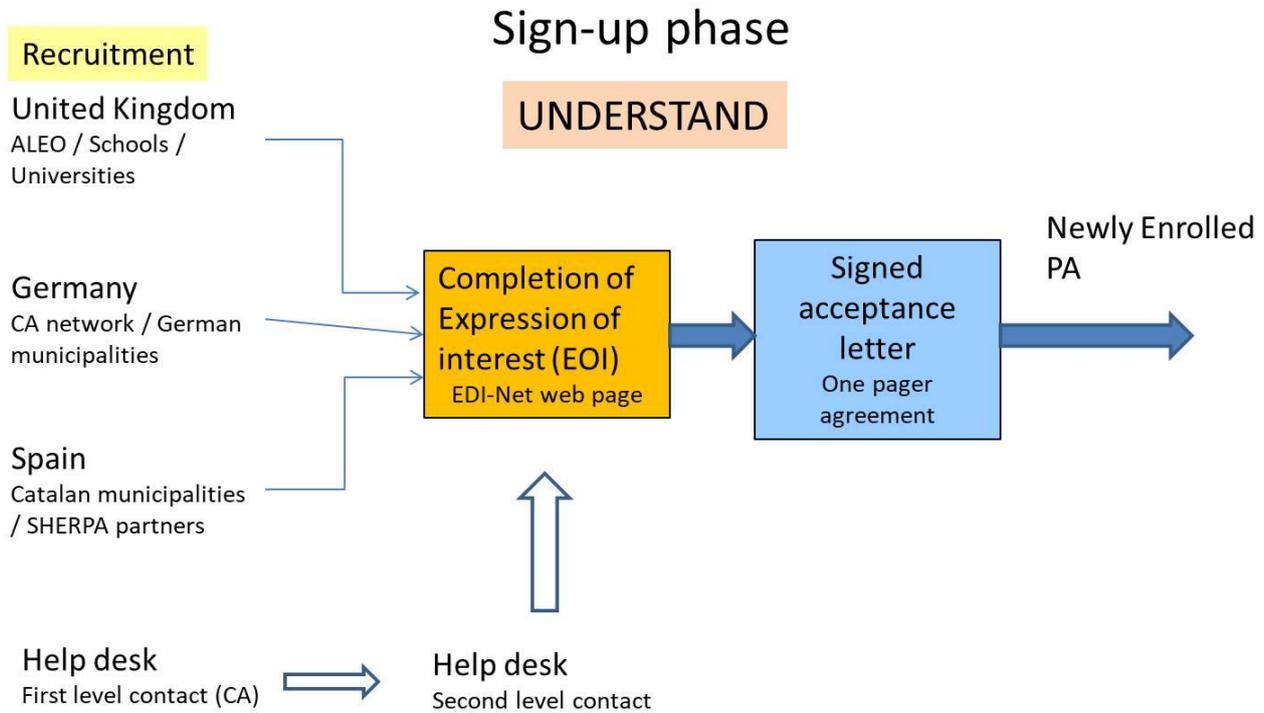
EDI-Net approach for new PAs

Sign-up phase

Figure 1: Overview of the recruitment process

2.2 Recruitment specifications

2.2.1 Recruitment in United Kingdom

In 2017, Leicester City Council promoted the EDI-Net service to neighbouring municipalities in the East midlands region through the Association for Local Energy Officers East Midlands network (ALEO). 31 district, borough, county and city councils were contacted. The project was also promoted at network meetings in the regional update part of the members meetings.

he project was promoted to a more proximate area first so that officers could easily attend training sessions and cluster together for support especially as the tools were at various stages of development. From the last quarter of 2017 and throughout 2018 a conscious effort is being made to promote EDI-Net more widely. This will be done through various means:

EDI-Net in schools

Leicester City Council is promoting the use of EDI-Net services within City schools through the Schools environmental coordinator and Greener schools campaign. Recently a training session for school

professionals was held in Leicester which had over twenty different practioners from local schools including Bursars, Finance managers and premises officers. It is hoped that this will not only help the schools achieve better environmental credentials, save energy and reduce carbon emissions but will also allow EDI-Net to be promoted to sister schools who may be in multi academy trusts. At the training event LCC presented how they were using the tools before schools were set up on the system and allowed to try the tools using their schools data. Staff from DMU and LCC were on hand to support officers to navigate around the systems and understand issues.

EDI-Net in other public authorities

In December 2017 EDI-Net project leaflets were sent out to local authority energy officers, chief executives and other professionals with the winter edition of the ALEO newsmagazine. Over 400 leaflets were sent out across the network which covers England and Wales.

This is going to be followed up with an article about EDI-Net being used by Leicester City Council as an example of good practice. This will then be followed up with some presentations to the various regional ALEOs across the country which will hopefully lead to greater awareness in the UK and interest from UK public authorities.

2.2.2   Recruitment in Spain

EDI-Net was promoted to Spanish municipalities via a Catalan and a Spanish mailing list. Unlike other countries, the government prepared a political launch to kick-off EDI-Net in Spain.

Invitation and dissemination for the political event at 20th October 2017 in Barcelona, Spain

All Catalan municipalities have been invited by email, sent by Mr. Carles Sala, Secretary of Housing and Urban Improvement. The dissemination of the event was supported by the four Catalan provincial councils and the Barcelona Metropolitan Area. The event was published in the European Funds Newsletter edited by the Foreign Affairs Department (see figure 6).

Political launch of EDI-Net in Spain

On the 20th of October 2017 EDI-Net was launched in Barcelona, Spain. The Department of Governance, Public Administrations and Housing of the Catalan government hosted representatives of Catalan public authorities and interested stakeholders at the launch event in the auditorium of the headquarters in Via Laietana 26 in Barcelona, Spain. Forty four persons attended the convention (see annex 1). The event was hosted by Mr. Xavier Marti, chief officer of the European programme, assisted by three political representatives from the Catalan government. The event was presided over by Mrs. Meritxell Borras, Catalan Minister of Governance, Public Administrations and Housing and Mr. Carles Sala, Secretary of Housing and Urban Improvement. The language was Catalan.

To attract interested participants, the Catalan ministry presented not only information about the EDI-Net initiative but also about other European project opportunities and financing possibilities. The Catalan minister Hble. - Mrs. - Meritxell Borras, Consellera de Governacio, Administracions Publiques i Habitatge of the Government of Catalonia opened the session with a short keynote speech.

Mr. Carles Sala i Roca, Secretari d'Habitatge i Millora Urbana of the Departament de Governacio, Administracions Publiques i Habitatge of the Government of Catalonia spoke about "Els projectes europeus a la Secretaria d'Habitatge".

Mr. Albert Castellanos, Director of Economic promotion, competition and regulation at the Department of Vice-presidency and Economy and Finance talked about financing European projects, the ERDF (European Regional Development Funds) in Catalonia and their use in the municipalities.

Figure 2: Cover sheet of the presentation of A. Castellanos

Mr. Jordi Castells, Deputy Director of Local Cooperation, Department of Governance, Public Administrations and Housing of the Government of Catalonia spoke about funds and local financing possibilities.

Figure 3: Cover sheet of the presentation of J. Castells

Sr. Xavier Marti Rague, Chief Officer of European Programs in the Secretariat for Housing and Urban Improvement in the Department of Governance, Public Administrations and Housing of the Government of Catalonia and project partner of EDI-Net then introduced the EDI-Net project as an information system for public buildings in Catalonia.

Figure 4: Cover sheet of the presentation of X. Marti Rague

Sr. Marti Rague talked about EDI-Nets objectives, the consortium, advantages of being a participant and the structure and objectives of the project.

Afterwards the EDI-Net project coordinator Prof. Paul Fleming of De Montfort University in Leicester, UK spoke about the experiences of the EDI-Net project in other European countries. Prof. Fleming provided information about the objectives of the initiative. He introduced the EDI-Net tools dashboard, benchmarking and forum as well as the helpdesk.

Mr. Jordi Cipriano of CIMNE – UPC (International Centre for Numerical Methods in Engineering of the Universitat Politecnica de Catalunya) and EDI-Net project partner spoke about the use of EDI-Net at the municipal level. He showed the functionality of the benchmarking tool, presented the objectives, the basic principles of EDI-Net, described the application and first results and demonstrated the forum. In November 2017 about 1500 buildings of the government of Catalonia and some more from other cities were using these tools. Mr. Cipriano explained the requirements for public authorities if they want to use the system, and what kind of assistance they could expect if they want to join the initiative. After a discussion the audience was

invited to attend the first EDI-Net training session in Catalonia three days later. For the agenda of the political launch, please see annex 2.

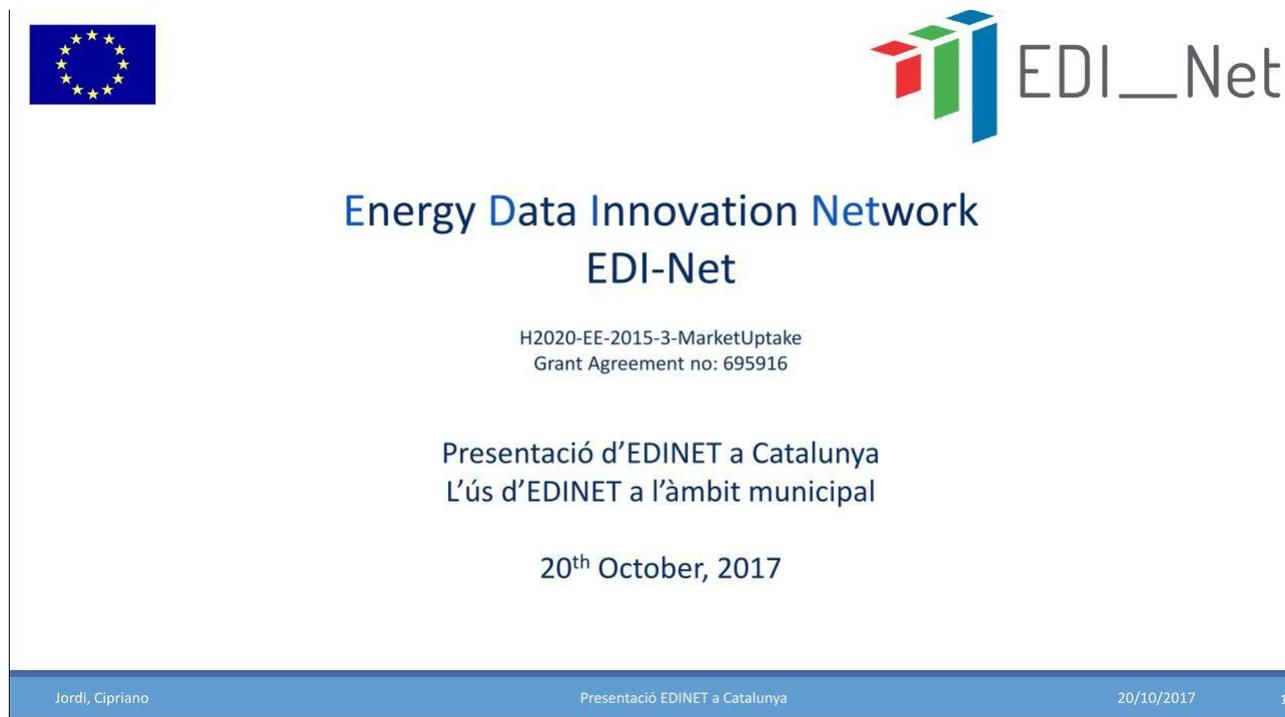**Figure 5: Cover sheet of the presentation of X. Marti Rague**

Coverage of the event

A press release of the event was issued on the Housing website and in Municat, a website which is dedicated to municipalities. Both websites belong to the Government of Catalonia. It was also announced through the Intranet of the Catalan Housing Agency. Additionally, news from the event was tweeted from the department's account.

Figure 6: Press coverage of the event

2.2.3   Recruitment in Germany

According to the Grant Agreement there is only one training session in Germany scheduled for year 3, while there will be two training sessions each in the UK and Spain.

After interested parties have completed the application form, they are called to establish a personal relationship and keep them engaged with EDI-Net. So far there has not been a training session in Germany. The challenge is to keep municipalities interested in EDI-Net for over 1 ½ years until the training in May 2018. Therefore it was decided to limit general recruitment in Germany, and enhance our activities in spring 2018 in anticipation of the June 2018 training session. Climate Alliance and Empirica are supposed to target public authorities in Germany as well as in Austria, Luxembourg and Switzerland.

During the exchange with several authorities in Austria, it was discovered that it might be difficult for Austrian municipalities to join EDI-Net, since they cannot gain access to their energy data from smart metering (statement from Energy Agency, Upper-Austria). Finally, experience showed that in Luxembourg it is difficult to recruit new partners because successful cooperation seems to require communication in the official language of the respective country as well as the use of a local telephone number and address. Therefore we decided to focus on German authorities for the recruitment for the coming training session.

Next steps

For the training session in Germany in 2018 we plan to approach several networks to enrol new potential partners. One is the European Energy Award, an international certification for municipal climate protection that supports municipalities in Germany and other countries in Europe to become more energy efficient. Other networks we will use to recruit new authorities are the Hessian Climate Protection Managers as well as the Energy Managers of the Climate Alliance members. Additionally, we will follow up the contacts we established at events like Energy Cities in 2017, which already showed interest in joining EDI-Net.

2.3   General outlook

The recruitment process will be continued, adapted to the experiences gained from the previous activities. It is planned to approach more than 100 public authorities until May 2018 (see annex 3).

Webinars will be available in English with specific training related materials in German, Spanish and Catalan (see Task 5.4.) They will be used both as training materials for participating public authorities and for partners that are not located in the United Kingdom, Spain and Germany and therefore cannot participate in the local training sessions.

3   Local training workshop

According to initial planning for year 2, one training event has been held in Leicester, UK and a second one followed in Barcelona, Spain. The general steps for the training events are described in the following chapter.

3.1   General

The logistics for the training event such as meeting room, catering, media technique, interpreters, etc., are organised by the local partners together with Climate Alliance. EDI-Net applicants are invited to the training workshop which includes general information, data sheet, agenda, travel form and a location plan. Interested persons are registered and kept up to date regularly. The training event includes traditional face to face presentations, combined with workshop activities, hands-on use of the software and campaign materials. Name tags, a participant list and the agenda are designed. All participants are personally welcomed to the training event.

Three further training sessions will be held in year 3 in Germany, UK and Spain. Current status for the next planned training sessions is:

− Barcelona 20th February 2018
− Leicester (anticipated) March 2018
− Nuremberg May 2018

In general, the agenda of the training event contains

− An introduction of EDI-Net,
− Presentations of the three important EDI-Net tools "Dashboard", "Forum" and "Benchmarking" as well as
− The four steps "Understand", "Set up", "Mobilise" and "Coach" developed in the training material followed by practical experience shared by the pilot cities partners.

Feedback received in each training session is used to improve future training sessions.

3.2   Local training workshop specifications

3.2.1   1st EDI-Net training session in Leicester, UK

Invitation and dissemination for the training event

The 1st EDI-Net training session took place on 5th July 2017 in Leicester, UK. This was two months later than scheduled in the Grant Agreement because the project wanted to present a more developed version of the EDI-Net approach. The Venue was De Montfort University. The invitations were sent out via email by Climate Alliance, DMU and Leicester City Council. In addition, public authorities in Germany were contacted via phone from Climate Alliance. The target groups of this event were energy managers. Twenty seven persons attended the training and signed the attendance list (see annex 4). The language was English.

The event

Prof. Paul Fleming of De Montfort University and project coordinator of EDI-Net opened the training session with a short overview of the day. The very first topic, "UNDERSTAND", gave an introduction to the overall EDI-Net concept and explained its motivation, aim and expectations. Mr. Strahil Birov from Empirica, one of the project partners, continued with an overview of the structure of the sessions and the materials. Afterwards the different EDI-Net tools were introduced, starting with the dashboard, which was presented by Mr. Prakash Patel from the Leicester City Council. Mr. Alexander Nordhus, energy manager of the city of Nuremberg and project partner, explained the forum and gave a demonstration and quick summary of its main activities. The benchmarking tool was presented by Mr. Juan Antonio Villalobos from the Generalitat of Catalonia, project partner of EDI-Net. The next topic "SETUP", led by Dr. Graeme Stuart of De Montfort University, demonstrated the functioning of EDI-Net, and covered data requirements and configuring devices. The third topic "MOBILISE" explained how to create a campaign around EDI-Net, for example by analysing the audience, planning appropriate materials and instruments for engagement, achieving consistency as well as sharing successful practices with others. Then the three pilot partners from Leicester, Nuremberg and Catalonia shared their experiences, followed by a feedback from new partners. The fourth and last topic "COACH" was again presented by Mr. Strahil Birov. He explicated that continuously delivered relevant information in form of advice and guidance are used to keep new partners at EDI-Net. More examples from the three pilot partners were introduced from Karl Letten (Sustainable Officer at De Montfort University), Lee Jowett (Environmental Education Coordinator at Leicester City Council), Prakash Patel (Energy Manager Team Leader in Leicester City Council), Alexander Nordhus (Municipal Energy Manager in the City of Nuremberg) and Juan Antonio Villalobos (Evaluation of European Programmes the Secretariat for Housing and Urban Improvement in the Department of Governance, Public Administrations and Housing of the Government of Catalonia) . Paul Fleming closed the session with an outlook of the next steps and the networking activities. The agenda of the workshop is attached in annex 5.

Figure 7: Training session in Leicester

Outcome

All attendees of the training session were followed up and asked them to complete a form requesting them information about the energy data management system to devise the data transfer strategy to import their data into the EDI-Net system. Only two interested public authorities returned the completed form. Further follow up emails were sent to the remaining attendees in Autumn 2017, and only three further interested public authorities provided the information. Up to date (January 2018), these five public authorities are in the process of being incorporated in the EDI-Net system.

3.2.2   2nd EDI-Net training session in Barcelona, Spain

Invitation and dissemination

The second EDI-Net training session, which was the first to be held in Barcelona, Spain, took place on October 23rd, 2017. The Department of Governance, Public Administrations and Housing of the Catalan government invited representatives of Catalan public authorities and interested stakeholders to a technical session. The event was disseminated along with the political launch a few days prior to the training workshop. The target groups were the technicians of the municipalities. During the political event it was strongly recommended to participate at the technical session.

Approximately 25 persons attended the training, with only 22 signing the attendance list (see annex 6). Six municipalities, one provincial council and three public agencies were represented. The participants were asked to bring data from the buildings of their municipalities so the session could have a practical approach. The session itself was conducted by two scientists from CIMNE. The language was Catalan.

The event

Similar to the political launch, Mr. Xavier Marti Rague, Chief Officer of European Programs in the Secretariat of Housing and Urban Development of the Government of Catalonia and project partner in EDI-Net, gave an overview by introducing the EDI-Net project. Afterwards Mr. Daniel Perez from CIMNE described the EDI-Net Project, especially the technical requirements, the use of EDI-Net at the municipal level and the benchmarking of EDI-Net. The project description was followed by a practical session, conducted by Mr. Daniel Perez from CIMNE and Mr. Eloi Gabaldon from CIMNE. The agenda of the workshop is attached in annex 7.

Figure 8: Training session in Barcelona

Follow up

An online evaluation questionnaire was sent to the participants of the technical session. The questionnaire asked about EDI-Net and about the training session. There was also a question asking for participants' interest in engaging with EDI-Net.

Six responses (27.3%) were received. Three municipalities answered that they wanted to be engaged in the project. Four municipalities found EDI-Net useful or very useful for the energy management of their buildings. All the municipalities found EDI-Net's energy recommendations helpful.

Future steps

The project partner from the Catalan Government will follow-up the municipalities that did not answer the questionnaire. All the 12 departments of the Catalan Government are working now with EDI-Net with a total of 1,164 buildings incorporated into the system. The next training session will be organised in cooperation

with the Catalan Government and the Polytechnic University of Catalonia (UPC) and aims for the technical staff from municipalities.

EDI-Net's synergies with SHERPA

EDI-Net's project partner in the Catalan government is also coordinator in the SHERPA project. SHERPA's main aim is to reinforce the capacities of public administrations at regional and sub-regional level to improve energy efficiency in public buildings and address difficulties related to energy efficient buildings projects in the Mediterranean area. SHERPA has created a working group "Information" led by CIMNE, where partners understand the potential to use information from smart energy and water meter data. SHERPA has 12 partners from 6 Mediterranean countries. 113 regional buildings are taking part in SHERPAs testing phase and 100 local buildings foreseen.

4   Conclusions

The following conclusions are based on our experiences from the networking and recruitment activities. Most of the small and medium sized municipalities cannot participate in EDI-Net because they do not use sub-hourly automatic meter reading (AMR) so far. Smaller municipalities often have only very limited personal resources and therefore nobody who works on a regular basis on the energy controlling. Cities without any sub-hourly metering seem to have little awareness of the wave of smart meter deployment to come (see also D4.3.) It would be important to learn when which city is being supplied to approach these cities early before expensive market solutions fill the market. In contrast, several large municipalities use AMR, but most of these municipalities have already set up an energy management system and are therefore not interested to join EDI-Net because they use software which shows them their energy consumption (e.g. InterWatt). It is challenging to convince municipalities to use alternative or complementary software that supports them to track energy performance in detail (F-R1) and communicate their performance in a user-friendly manner (F-R2) (as described in deliverable 2.2). Potential levers to compel authorities to use EDI-Net anyway are the dashboard (Tool 1) as well as the benchmarking tool (Tool 3) (see also deliverable 2.6). Especially the dashboard with its smiley faces is a very useful tool, designed for non-energy experts such as building users. Our experiences show that more potential users need to be approached and that more time per user is necessary to recruit them than originally anticipated.

Another problem we face is the circumstance that in many municipalities employees at the administration level are not allowed to travel abroad, only decision-makers from the political level have permission. Therefore recruitment makes only sense in countries where training sessions are being held.

We strongly recommend that the recruitment should be performed on a personal direct level from somebody working in the same country as the applicant. This makes the recruitment process easier, because for some potential partners calling someone in a foreign country and talking to them in a foreign language is a big obstacle and can lead to a failure of the process. It is difficult to involve people (e.g. from Scandinavia, Austria, Eastern Europe) in the project who cannot participate in the training sessions due to restrictions in business travel. Training sessions are not only an instruction on how to use EDI-Net but also a way to connect with the project partners and establish a personal relationship, which we consider very important for the success of the project.

Annexes

Annex 1: Attendance list political launch Spain

Annex 2: Agenda of the political launch Spain

Annex 3: Status of recruitment and enrolment of new public authorities

Annex 4: Attendance list training session UK

Annex 5: Agenda training session UK

Annex 6: Attendance list training session Spain

Annex 7: Agenda training session Spain