# Platone

## PLATform for Operation of distribution NEtworks

# D8.8

# Communication and Dissemination Plan (v2)

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**Abstract**

The deliverable D8.8 **"Communication and Dissemination Plan (v2)"** is the third of four editions of the communication and dissemination plan for Platone. This plan summarizes and structures all running and upcoming communication and dissemination activities according to the development stage of the project. It gives a comprehensive overview of the communication and dissemination strategy, the derived measures and implementation and the collaboration and cooperation activities with focus on the project months 28 - 36. Furthermore, it outlines the controlling of the planned activities. Each updated edition integrates the lessons learned of the past and ongoing activities. It also takes into account all changes and improvements of the Platone project and of external circumstances, adapting the communication and dissemination strategy accordingly where appropriate. The communication and dissemination plan is updated annually.

**Keyword list**

Communication, Dissemination, Exploitation, Project design, Project logo, Marketing, Cooperation, Collaboration, Community

# Executive Summary

"Innovation for the customers, innovation for the grid" is the vision of project Platone - Platform for Operation of distribution Networks. Within the H2020 programme "A single, smart European electricity grid", Platone addresses the topic "Flexibility and retail market options for the distribution grid". Modern power grids are moving away from centralised, infrastructure-heavy transmission system operators (TSOs) towards distribution system operators (DSOs) that are flexible and more capable of managing diverse renewable energy sources. DSOs require new ways of managing the increased number of producers, end users and more volatile power distribution systems of the future. Platone is using blockchain technology to build the Platone Open Framework to meet the needs of modern DSO power systems, including data management. The Platone Open Framework aims to create an open, flexible and secure system that enables distribution grid flexibility/congestion management mechanisms, through innovative energy market models involving all the possible actors at many levels (DSOs, TSOs, customers, aggregators). It is an open-source framework based on blockchain technology that enables a secure and shared data management system, allows standard and flexible integration of external solutions (e.g., legacy solutions), and is open to integration of external services through standardized open application program interfaces (APIs). It is built with existing regulations in mind and will allow small power producers to be easily certified so that they can sell excess energy back to the grid. The Platone Open Framework will also incorporate an open-market system to link with traditional TSOs. The Platone Open Framework will be tested in three European demos and within the Canadian Distributed Energy Management Initiative (DEMI).

Deliverable D8.8 provides the communication and dissemination plan for Platone, outlining how Platone communicates and disseminates its activities and results. In addition to the communication and dissemination plan, in the second part of the project's duration a detailed elaboration for the commercial exploitation was given with the deliverable "Exploitation and Marketing Plan for the involvement of partners and future customers".

The document is the third edition of four of the communication and dissemination plan for project. It summarizes and structures - based on an overall strategy - all running and upcoming communication and dissemination activities according to the development stage of the project for every upcoming project year. The annual update integrates lessons learned from past and ongoing activities and takes into account all changes and improvements of the Platone project as well as of external circumstances.

Communication as well as dissemination aspects like cooperation and collaboration efforts are merged in an overall communication and dissemination strategy and related measures and tools. The strategy determines how to convey messages to stakeholders in order to achieve the strategic goals of Platone. For obtaining the communication objectives, suitable interest groups and stakeholders to be approached had been identified in the beginning of the project and have been updated where needed. Communication and dissemination objectives give guidance on what measures have to be implemented. The strategy takes into account that the communication and dissemination activities, especially in close to market projects, need a change of focus as the project progresses. Therefore, different emphasis is put on communication and dissemination activities and the addressed stakeholders during the project lifetime. A clear organization of the communication processes ensures an effective implementation of the measures.

All communication and dissemination activities are supported by high-quality marketing material, stakeholder-specific information and publications and communication tools like a project website and social media channels.

To spread Platone content, a multichannel approach is chosen by using synergy effects wherever possible. Channels of networking and cooperation partners play an essential role to distribute and disseminate later Platone results. All channels are regularly updated with non-sensitive and publicly available information on the progress and outcomes of the project and serve as a means for engagement with even more stakeholders. Platone ensures open access (free of charge online access for any user) to all peer-reviewed scientific publications relating to its results.

Virtual or physical events of all kinds are an indispensable channel to distribute information about Platone, a place to initiate and strengthen cooperation and collaboration activities and to establish contact with potential stakeholders, potential users and customers. At events, from focus meetings up to international conferences, most of the communications tools and channels merge - including

presentations, moderation, co-organization with partners and intermediaries, booths, media presence etc. Besides knowledge transfer and one-way distribution of information, different kinds of interactive events are a very effective way to attract, involve and link relevant stakeholders.

The community approach forms a central part of the strategy. The community is open for all stakeholders, who are interested in flexibility issues. The aim is to bring together stakeholders, who are interested in flexibility issues, to share knowledge concerning flexibility issues and foster transnational learning and maximize impact aiming to develop a market for flexibility. Furthermore, it focusses on collaboratively finding approaches and solutions to cross-cutting topics affecting many of the flexibility actors, in order to achieve a maximum impact and create a cross-project, cross-border learning effect.

The Platone consortium has an excellent starting point to connect to intermediaries and for cooperation due to its well-established collaboration network in Europe and beyond (e.g. Canada), with contacts to many key players of the depicted target audience and partners involved in industry associations, standardization, European energy governance and research networks as well as an active role in other H2020 projects or initiatives. This network is continuously established and strengthened for Platone to connect stakeholders on different levels and purposes. Intermediaries and cooperation partners can facilitate the communication and dissemination activities on different levels and purposes by being multipliers within specific stakeholder groups, by having influence on regulation and standardization activities, by providing their channels for distribution of content or event related collaboration etc. There is an expected overlap between the groups involved in collaboration and cooperation and is closely related to the community approach.

Finally, an annual controlling of effectivity and efficiency of the implemented measures and budget ensures an adjustment in strategy and measures where necessary. Therefore, specific, measurable, attainable, relevant and time-bound key performance indicators are outlined.

Platone

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## Table of Contents

# 1 Introduction

The project "PLATform for Operation of distribution Networks – Platone" aims to develop an architecture for testing and implementing a data acquisition system based on a two-layer Blockchain approach: an "Access Layer" to connect customers to the Distribution System Operator (DSO) and a "Service Layer" to link customers and DSO to the Flexibility Market environment (Market Place, Aggregators, …). The two layers are linked by a Shared Customer Database, containing all the data certified by Blockchain and made available to all the relevant stakeholders of the two layers. This Platone Open Framework architecture allows a greater stakeholder involvement and enables an efficient and smart network management. The tools used for this purpose will be based on platforms able to receive data from different sources, such as weather forecasting systems or distributed smart devices spread all over the urban area. These platforms, by talking to each other and exchanging data, will allow collecting and elaborating information useful for DSOs, transmission system operators (TSOs), Market, customers and aggregators. In particular, the DSOs will invest in a standard, open, non-discriminatory, blockchain-based, economic dispute settlement infrastructure, to give to both the customers and to the aggregator the possibility to more easily become flexibility market players. This solution will allow the DSO to acquire a new role as a market enabler for end users and a smarter observer of the distribution network. By defining this innovative two-layer architecture, Platone strongly contributes to aims to removing technical and economic barriers to the achievement of a carbon-free society by 2050 [1], creating the ecosystem for new market mechanisms for a rapid roll out among DSOs and for a large involvement of customers in the active management of grids and in the flexibility markets. The Platone platform will be tested in three European demos (Greece, Germany and Italy) and within the Distributed Energy Management Initiative (DEMI) in Canada. The Platone consortium aims to go for a commercial exploitation of the results after the project is finished. Within the Horizon 2020 (H2020) funding programme of the European Commission "A single, smart European electricity grid" Platone addresses the topic "Flexibility and retail market options for the distribution grid".

Under H2020 it is essential that the society benefits from the investment in these projects. Therefore, there is a clear accent on the beneficiaries' obligations to exploit and disseminate the outcomes of the funded activities [2],[3]. To meet the obligation to exploit and disseminate Platone's outcomes, a transverse work package (WP) on dissemination and exploitation WP8 was designed. The main objective of this work package and its related tasks is to maximise the scientific, industrial and societal impact of Platone by organising its engagement with a broad range of stakeholders. As a transverse work package, it is closely related to all other work packages and all partners are contributing.

## 1.1 Associated Tasks

WP8 comprises six tasks and related deliverables and milestones to accomplish dissemination and exploitation of results:

- Task 8.1: Designing and implementing communications tools with its deliverables
    - o D8.2 Website with interactive community platform (project month 3)
    - o D8.3 High quality videos explaining the approaches in the 3 trials (project month 24)
    - o MS1 Project website and interactive Platone community platform available (project month 3)

- Task 8.2: Fostering adoption of Platone results

- Task 8.3: Organizing Platone dissemination and uptake events with its milestones
    - o MS6 Well accepted open days at all 3 trial sites presenting and discussing prototype solutions (project month 18)
    - o M11 Successful midterm conference in Brussels (project month 24)

- Task 8.4: Preparing long-term adoption of Platone solutions

- Task 8.5: Contribution to European Joint RDI efforts with its deliverable
    - o D8.6 Summary of Platone contribution to BRIDGE WGs (project month 48)

- Task 8.6: Exploitation of the results

   ○ D8.5 / D8.10 Exploitation and Marketing Plan for the involvement of partners and future customers (v1 (project month 24)/v2 (project month 40))

The four editions of the deliverable "Communication and Dissemination Plan" D8.1, D8.7, D8.8 and D8.9 cover at least the tasks 8.1, 8.2, 8.3 and 8.5.

The tasks 8.4 and 8.6 are reported on in the two editions of the deliverable on "Exploitation and Marketing Plan for the involvement of partners and future customers", which focus on the commercial exploitation, D8.5, submitted in August 2021 and D8.10, due in December 2022.

D8.4 "Intermediate report on the stakeholder engagement, exploitation, dissemination, communication and standardization activities", submitted in August 2021, covers the whole work package.

The objectives of the reported activities regarding communication, dissemination and exploitation are to maximize the take-up of the elaborated knowledge, both for commercial purposes and for policy making, to boost research and innovation among participants within the programme as well as among other actors who could benefit from the research conducted, to make the expenditures on the research and development activities accountable and transparent and to show how the citizens of the European Union (EU) benefit from the results.

## 1.2 Objectives of the Work Reported in this deliverable

The objective of the work reported in this document is to maximise the scientific, industrial and societal impact of the Platone results. With information and knowledge transfer, the consortium is giving general and specific information on all Platone contents and activities. Opening up options for actions, convincing, gaining synergy with and supporting the determining stakeholders are essential steps towards later exploitation. Developing Platone´s target group, the consortium has focussed on approaching potential users for the Platone Open Framework. To establish Platone´s stakeholder relationship, the partners are continuously proposing an active management of the project´s key stakeholders based on successful information and knowledge transfer. With the project´s exploitation activities, the consortium aims to effectively promote the use of project results through scientific, economic, political or societal exploitation, aiming to turn research, development and innovation (RDI) actions into concrete value and impact for society. With the standardisation activities, the consortium elaborates which standards are used in, or are best suited for, the Platone project demonstrations and best serve their goals for the functionality of each use case.

Platone sets itself the following impact objectives:

• To influence trends in the energy sector by publishing our research concepts in well-known international journals and demonstrating our trial results;

• Building the foundations of a service industry for Distribution System Operation, and influencing legislation and regulation at European level to ensure that there is support for innovative scenarios and services, defined as a result of Platone implementation activities;

• To build on an innovative exploitation approach, creating the conditions for a European consortium to provide cloud-based services to DSOs. Such an approach will put Europe in the forefront of innovation thanks to science-based legislation, and

• To have an impact on economic development through growth in small and medium-sized enterprises (SMEs) and job creation leading to global market share growth for European providers in the information and communications technology (ICT) and energy sectors. The Platone vision will unlock a new service-oriented market making the energy system of Europe the most advanced and open in the world.

With the reported activities Platone is following the three main project phases.

The first phase of the project spanned over 20 months. A definition of the scenarios, use cases, the elicitation of user requirements and system requirements, dynamic assessment modelling, definition of system architecture and data models were elaborated. At the end of phase 1 the first integrated prototype was released. Evaluation was started via prototyping and testing referring to the three trials, to identify potential limitations and drawbacks by involving a group of selected users. Therefore, communication and dissemination activities in phase 1 focused on raising awareness for the project and

getting in touch with selected key stakeholders, especially regarding user-centric and customer integration. Standardisation activities focused on describing and identifying standards in the context of the use cases of the demonstrations.

Project phase 2 spans again over 20 month and is based on the feedback from Phase 1. The framework is being evaluated at both usability and performance levels. Testing is being increased, including a user evaluation with a wide group of users. The communication and dissemination activities in Phase 2 are focussing on the trials and associated interim results and first steps to prepare the commercial exploitation of the Platone results in the phase 3 which will span over the last 8 project months.



**Figure 1: Project phases of Platone and impact of the COVID-19 pandemic**

Communication and dissemination activities occurring in phase 1 and still in phase 2 have been impacted by the Corona virus disease 2019 (COVID-19) pandemic, e.g. due to travel restrictions, contact restrictions, cancelled or postponed events. Therefore, activities have been and are still being adapted and rearranged where needed, e.g. by using virtual event formats and digital materials. With the adoptions within the project as well as in the organisational and social environment it is anticipated that the impact of COVID-19 is decreasing within phase 2 in comparison to phase 1 of the project.

## 1.3   Outline of the Deliverable

The "Communication and Dissemination Plan" for Platone outlines the strategy and measures to communicate and disseminate the project´s activities and results. Following the introduction, Chapter 2 describes how the communication and dissemination aspects are merged in an overall communication and dissemination strategy for the Platone project with its strategic approach, the communication and dissemination objectives and main stakeholders. Chapter 3 outlines the measures and tools to accomplish the objectives and the implementation of the measures. Chapter 4 is about controlling of the activities in form of key performance and further indicators. An annual controlling of effectivity and efficiency of the implemented measures ensures that an adjustment in strategy and measures can be made where necessary. The plan is updated annually to take all these aspects into account. The conclusion of the deliverable is provided in Chapter 5. The Annex covers a template for the stakeholder specific communication matrix and an overview of planned and earmarked events.

## 1.4   How to Read this Document

This deliverable provides a comprehensive overview on the communication and dissemination activities Platone is implementing and planning. D8.8 is third of four editions of the communication and dissemination plan. It follows the deliverables D8.1 and 8.7 which were delivered in project month three (November 2019) and project month 15 (November 2020) and will be followed by a last updated edition for project year four.

D8.8 replaces D8.7 as it takes into account first steps of implementation and lessons learned and shifts the focus towards the now running Phase 2 of the project. The current edition takes into account the state of the art regarding new collaboration and cooperation opportunities, framework conditions (e.g. national or international regulation, conventions, funding programmes or other incentives), activities within the bodies of the European Commission or the exceptional circumstances of the COVID-19 pandemic, which is still affecting the worldwide society.

# 2 Communication and Dissemination Strategy

The communication strategy determines how to convey messages to stakeholders in order to achieve the strategic goals of Platone. For reaching the communication objectives and approaching suitable interest groups, the different stakeholders have been identified and defined.

The strategic approach describes how to convey the right messages to the key stakeholders and determines specific, measurable, attainable, relevant and time-bound targets. Beyond that, the focus of the communication and dissemination activities is being adapted to the project progress. Communication is successful when it exactly meets its target group. Specific key messages for the key stakeholders are linked to suitable tools and channels of communication and per project phase. Also, appropriate style and tonality are applied for stakeholder-specific communication. A clear organization of the communication processes ensures an effective implementation of the measures.

## 2.1 General Strategic Objective

DSOs have a growing need for real-time insight into the operation of their networks while unlocking new flexibility markets in a fair and open way. The utility challenges that Platone addresses are

- the need for DSOs to secure power supply in the context of ever-increasing penetration of renewable energy sources (RES),
- the need for DSOs to gain near real-time insight into the operation of the networks and to can optimise them in near real-time,
- the need to unlock local markets of flexibility to address local congestions and voltage stability issues and
- the need to effectively support TSO system-level operation through providing flexibility for ancillary services

To meet these challenges Platone's strategic objective is to provide a two-layer platform for distribution network operation and market operation enabling a seamless integration of local prosumers in an open market structure.

Therefore, Platone is developing a cost effective two-layer platform where edge cloud technology supported by blockchain mechanisms provides an easy and secure access to customer level data for operation and flexibility markets. The Platone solution also integrates advanced monitoring and data-driven algorithms for increased observability down to the low voltage level using low-cost high-precision measurement devices. The Platone platform will be a scalable solution for the distribution operator provided as a turnkey service.

## 2.2　Stakeholders

Those stakeholders with the largest influence on reaching the Platone strategic objective are the main stakeholders of communication and dissemination activities. The main stakeholders comprise also target groups for the preparation of a commercial exploitation of Platone results.
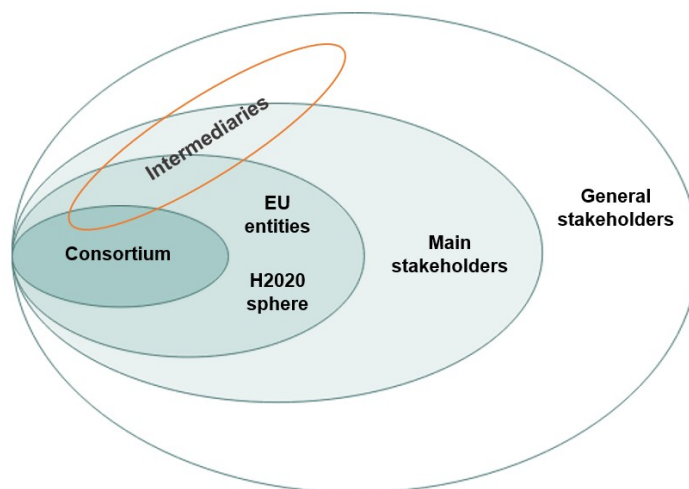


**Figure 2: Platone Stakeholders**

In addition, stakeholders in the context of H2020, such as other H2020 projects on flexibility issues or smart citizen-centred energy systems, and further institutions within the programme and the funding body, the European Commission (EC), are important, especially for cooperation and joint dissemination activities (e.g. BRIDGE H2020, European Technology and Innovation Platform Smart Networks for Energy Transition (ETIP SNET) and OPEN DEI working groups). There is a flowing transition between programme related, main stakeholder group intermediaries and interest groups. To that end, the consortium is using the projects, groups and channels that partners are directly involved in.

Additionally, general stakeholders like the "green public" and consumer organizations, which shape public opinion regarding ecological sustainability and safety of energy supply, can be crucial for future wide-spread implementation of the Platone framework. Further, general stakeholders include universities and research institutes, practitioners in the energy domain, industry experts and executives or venture capitalists.

The following main stakeholders are identified having a reasonable relevance for the Platone project:

- The DSO community delivers the key target for an uptake of the Platone project solutions. Three DSOs are directly involved in the project.
- The TSO community is closely linked with the DSO community. Improved coordination between transmission and distribution system operators becomes essential to integrate distributed energy resources and gain maximum system flexibility. Platone solutions can facilitate DSO support to TSOs at system level. Platone is assessing the interface with this type of stakeholders simulating the interactions in the demo and also thanks to the participation of some of its partners in two of the recent TSO-DSO interaction projects (e.g. CoordiNet [4], SmartNet [5]) offering full alignment with the most recent result as by product.
- National energy associations connect players within the energy field and can provide aggregated feedback on Platone solutions based on specific national conditions. They are central for the dissemination of the Platone results, especially in maximising the acceptance of Platone enabling software-modules and applications based on the field trial learnings and spreading Platone prototypes and recommendations.
- All types of European and national bodies who are in charge of defining roadmaps and frameworks for the development of the European energy system are essential to pave the way for a possible implementation of Platone solutions.

- Regulators on national and European level can have a relevant impact on the exploitation phase of the Platone solutions as they can enforce regulations which can affect the implementation of Platone solutions. Beyond that they can provide incentives to DSO/TSO market-related bodies to offer flexibility products.
- Academia and research centres have insights on the most recent innovative solutions and transfer these into the Platone consortium and deliver valuable feedback. They help to disseminate Platone results and link them to ongoing research activities. In addition, they help to build bridges to other ongoing or upcoming relevant activities.
- Standardization bodies can support the exploitation of Platone results and lessons learned since Platone aims at delivering universal solutions.
- Bodies of the European Commission help to connect with other EU projects responding to the same call as Platone and give guidance on current state of the art within the EU family of research projects.
- Strategic partners in preparation of a market rollout, such as:
  - Business oriented institutions on European level
  - Manufacturers and service suppliers
  - Service oriented innovation community of Small and Mid-sized Enterprises (SME's)
  - Start-ups
  - Investors
  - Intermediaries in energy industry organisations / Industry initiatives with energy focus

A detailed description of the main stakeholders and their specific opportunities and challenges is part of the comprehensive stakeholder specific communication matrix (this is not made public, but for the template see Annex A.1).

## 2.3  Strategic Approach

With its comprehensive communication and dissemination strategic approach, Platone fosters the growth and promotes integration of its solutions among not only DSO operators, but also towards all the other market operators involved, unlocking new opportunities for a wider and more efficient flexibility market.

To meet the strategic goals and the challenges and opportunities regarding the main stakeholders a multi-track strategic approach with the following elements is chosen:

- Information and knowledge transfer to all stakeholder groups,
- Barrier reduction, e.g. for regulators and standardization bodies,
- Target group development and contact initiation especially for customer engagement in the trials,
- Stakeholder relationship management including target group development and contact initiation especially customer integration, e.g. within the trials, active involvement of stakeholders, e.g. for a Platone community, lateral project cooperation and as well as a basis for later preparation of exploitation.

Communication activities cover the whole project from the beginning and target multiple audiences, including media and the general public. Dissemination activities focus mainly on the results and target audiences that may use the results in their own work, including peer groups, industry, professional organizations or policymakers. Therefore, the communications activities were in the focus of the first phase of the project while dissemination activities are gaining impact as more (interim) results are available in the second project phase. For Platone a fast forward dissemination concept is chosen: having a well-established collaboration network in Europe, with contacts to many key players of the depicted target audience and partners involved in industry associations, standardization, European energy governance (e.g. European Technology and Innovation Platform (ETIP)) and research networks (e.g. European Energy Research Alliance (EERA), European Research Area Network (ERA-Net) Smart Grids Plus) the Platone consortium has an excellent base for impact generation activities and to foster the take-up and use of results.

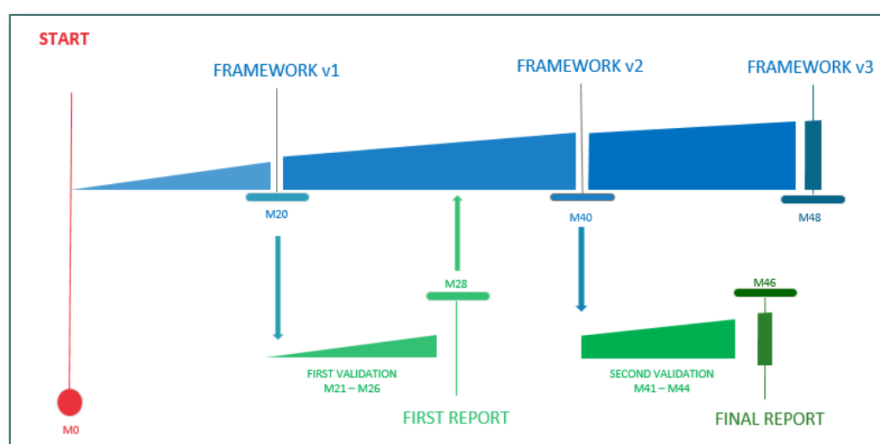The Platone Open Framework development will follow three main phases, as shown in Figure 3.



**Figure 3: Development and Evaluation Phases**

Phase 1 spanned over the first 20 months (M1-20) of the project. It included definition of the scenarios, use cases, the elicitation of user requirements and system requirements, dynamic assessment modelling, definition of system architecture and data models. At the end of Phase 1 the first integrated prototype was released. Evaluation is about to start via prototyping and testing referring to the three trials, to identify potential limitations and drawbacks involving a group of selected users.

The communication and dissemination activities in Phase 1 focused on raising awareness of the project and getting in touch with selected key stakeholders, especially regarding user centric and customer integration. The main communication materials, tools and channels have been set up to (e.g. project website, general project information or mailing lists). Customers have been involved in the trials from the beginning. The Platone community is promoted and established and the Platone project has been represented at several stakeholder relevant events by selected consortium members. Activities occurring in Phase 1 have been heavily impacted by the COVID-19 pandemic. Due to the worldwide COVID-19 situation, communication and dissemination were adapted and rearranged where needed.

Phase 2 (August 2021 (M21) – December 2022 (M40)) is based on the feedback from Phase 1. The scenarios and both user and technical requirements are being refined and a new version of the platforms will be integrated in an intermediate version of the framework, functionally complete. The Platone Open Framework is being evaluated at both usability and performance levels. Testing is being increased, including a user evaluation with a wide group of users. All plans likewise depend still on the COVID-19 impact and duration of the pandemic.

The communication and dissemination activities in Phase 2 are focussing on the trials and associated interim results. Among other things, a set of high-quality videos explaining the approaches of the trials have been developed and released, and the Platone community is being extended. The first steps to prepare the commercial exploitation of the Platone results, like organizing exploitation workshops, are about to start.

Phase 3 (January 2023 (M41) – August 2023 (M48)) is based on the evaluation results of Phase 2, leading to the refinement of component and system level technology consolidation, enhancing the final prototype. Usability, user behaviour evaluation and impact creation will be analysed and assessed. Furthermore, this phase will take into account the preliminary simulation results, using them as feedback for the final prototype release.

The activities in Phase 3 will focus on preparation of the commercial exploitation and market take up of the results, rollout and take-up of the Platone solution after the project. A business plan for exploitable results will be elaborated.

The activities in Phase 3 will focus on dissemination activities supporting the commercial exploitation and market take-up of Platone solution after the project.

All basic and further communication as well as dissemination activities run throughout the whole project lifetime.

## 2.4   Communication and Dissemination Objectives

Communication and dissemination objectives give guidance on what measures have to be implemented. They are checked regularly on how effectively and efficiently input and outflow correlate. The controlling of communication activities is based on related key performance indicators, which are specific, measurable, attainable, relevant and time-bound and are outlined in detail in Chapter 4.

A detailed elaboration for the commercial exploitation has been given with the deliverable "Exploitation and Marketing Plan for the involvement of partners and future customers", submitted in August 2021 (M24) and with the second edition due in December 2022 (M40).

### 2.4.1   Knowledge Transfer and Barrier Reduction

Information and knowledge transfer give general and specific information on all Platone contents and activities. The Platone Open Framework may encounter user, stakeholder or regulatory barriers. Not all players in the energy sector may see a general need for new flexibility products. The business of equipment producers may be disrupted. For other players Platone opens new opportunities. DSOs will gain an open-source DSO Technical Platform. To facilitate later exploitation, it is essential to open options for actions, convince, gain synergy with and support the determining stakeholders.

Communication and dissemination objectives:

- Provided understanding of the Platone Open Framework as a base for removing potential barriers making the advantages of the new solutions clear per specific stakeholder.
- Direct involvement of DSOs to allow Platone to find the best way to make the sector aware of the advantages offered by the new solutions.
- Impact on target groups who highly emphasise regional renewable energy (usually smaller utilities and regional DSOs and energy communities).
- Impact on target groups who potentially have an impact on Europe's leadership in ICT solutions for flexibility.
- Impact on all types of European and national bodies in charge of defining roadmaps and frameworks for the development of the European energy system to allow for and foster deployment of that new technology.
- High visibility of the project in professional circles as well as with the general public.
- Understanding of the Platone Open Framework and exploitation implications, as a base for scalability and replicability.
- Demonstration of the Platone Open Framework in different contexts (three running demonstrations).
- New set of innovation driven research regarding monitoring and optimization services in the energy sector.
- Standardization processes on concepts and solutions for worldwide use of the Platone Open Framework.
- Impact on developers of the new Strategic Energy Technology Plan (SET-Plan) to consider the new opportunities.

### 2.4.2   Target Group Development

Target group development focuses on approaching potential users for the Platone framework. An early integration of future target groups to specify future needs and requirements is an essential part of the development of the Platone framework. As many DSOs as possible shall as soon as possible get in contact with these future proof solutions. A high overlap of involved stakeholders and later target groups is given.

Communication and dissemination objectives:

- Share information on Platone within business networks for decision makers at DSOs.
- Test and use of Platone functionality by a new generation of grid operators, students and Energy Sector professionals.
- Introduce Platone technology into the products of established and new suppliers of the energy industry to motivate them to build new products and services.
- Investors considering the new technology for seed investment.

- DSOs ready for creating "local flexibility markets" where they can place their needs of flexibility and aggregators participate putting together TSOs' and DSOs' needs.
- New products and businesses of established and new suppliers of the energy industry.
- Successful integration of users and further potential user in the trials (the strategy for the integration of customers in the trials is not part of this deliverable but will be addressed by, e.g. work package 1).
- Visibility of scaled up and replicated trials.
- Launch Platone community and support joint community on flexibility issues.

### 2.4.3 Stakeholder Relationship Management

The stakeholder relationship management proposes an active management of the key stakeholders and is based on successful information and knowledge transfer. Stakeholder relationship management integrates a sustainable approach, which aims at a take-up of the project results during the project or after its end.

- Establish Platone community support joint community on flexibility issues to ensure continuation after the project.
- Collaboration with intermediaries, such as energy related national associations and institutions, mainly in the countries involved in trials and European entities.
- Successful involvement of prosumers and smart customers in the trials.
- Successful lateral project networking.
- Interest of companies in using the Platone platform.
- Uptake of the Platone platform by service providers.
- Scaled-up and replicated demo experiments.

## 2.5 Stakeholder-specific Communication

Every main stakeholder needs a tailored communication approach regarding communication challenges and opportunities, objectives and special requirements. Success in this means that a communication measure converts into action of the targeted stakeholder like declaring interest to engage in trials, joining the community or participating in an event. Following the communication and dissemination strategy, the communication tools and channels are chosen (and adjusted) very carefully to get the wanted action by the target groups and to bring the right message to the right audience via the appropriate channel in a matching style and tonality.

Also, the place of action is relevant. Therefore, a wide communication mix is adopted in Platone.

A (non-public) stakeholder specific communication matrix supports stakeholder specific communication activities. For the main stakeholders the desired outcomes are outlined, specific key messages developed and linked to suitable tools and channels of communication per project.

Beyond the main target group, further stakeholders who have potential influence on Platone, e.g. press, politics, potential users or critics, are addressed by appropriate tools and channels, related to the context.

# 3 Measures and Implementation

## 3.1 Organization and Coordination of Activities

Every person in the consortium acts directly or indirectly as a communication and dissemination actor, e.g. at events, in dialogue with cooperation partners, etc. The hub for all activities is the dissemination team, coordinated by consortium member B.A.U.M. in close collaboration with the task leaders RWTH Aachen University and E.DSO. The communication and dissemination team is responsible for coordination, implementation and evaluation of the measures. In order to safeguard an interdisciplinary exchange within the consortium in belonging of these targets, representatives of all partners meet on regular basis in WP8 virtual meetings.

Beyond that, the dissemination team collects, validates and forwards cooperation, media or community enquiries, collects and/ or coordinates event participations and reviews.

All consortium members share their activities like event participation, contact inquiries, publications and press reviews but also special needs with the dissemination team for a successful joint communication and dissemination.

A general contact with e-mail and phone number for external inquiries of all kinds is managed by the dissemination team.

For further project management structure and procedures see D9.4 Project Management Plan, V2.

## 3.2 Project Identity

### 3.2.1 Logo and Project Design

The project design guarantees that everything realized within Platone is recognized as part of it. The logo is included on every type of marketing material (e.g. project folders, presentations) and is used for every type of template and publication (e.g. deliverables). The logo is used for external as well as internal communication and it may in no case be adjusted or changed. The colour scheme and fonts are centrally considered in every type of digital or print material and online tools like the project website.



**Figure 4: Platone project design logo and colour scheme**
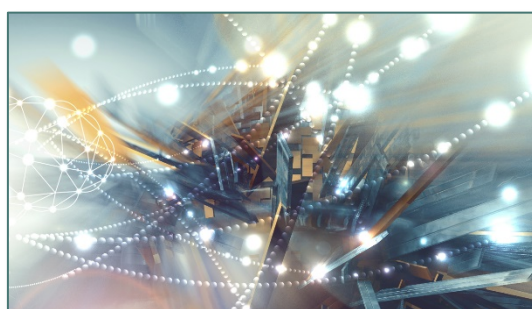


**Figure 5: Platone project design visual element**

Figure 6: Platone project design transferred to presentation

### 3.2.2 Slogan and Keywords

The project keywords and a set of slogans were prepared by a co-creation process within the consortium.

For general project information currently, the following key slogan is used:

*Smart integration for market innovation –*
*Innovation for the customers, innovation for the grid*

Keywords are essential for the communication of content and in the context of stakeholder specific communication. They are also used to find the right "hashtags" in the context of social media activities (see Chapter 3.4.4).

### 3.2.3 Visualization

Visualizations of Platone issues help to transport messages, e.g. through visualization of the interaction of market actors via Platone or close to everyday live use cases of the Platone technology.

Visuals are used on the website, for presentations and posters at events etc. Depending on the focus of the project phase (see Chapter 2.3), the graphic material is expanded and further developed. The Platone project identity (see Chapter 3.2) delivers the foundation for all visual and graphic material.

## 3.3 Communication Material and Tools

All activities are supported by high-quality marketing material, publications, stakeholder specific information material and communication tools like a project website and social media channels.

### 3.3.1 Website

The project website serves as central information platform for Platone. The purpose is to inform interested stakeholders about the project and it includes all main information on the project, its progress, project related news and events. Different information levels take into account different stakeholder needs.

Off page and on page search engine optimization (SEO) ensures high visibility for online content.

The Uniform Resource Locator (URL) for Platone is:

**www.Platone-h2020.eu**

An annual revision of the website ensures its topicality and focus. In addition, partial extensions are implemented as ready or as needed (e.g. Advisory and Dissemination Board (ADB) section added 2020, Use Cases of the Demonstrations planned for 2022).
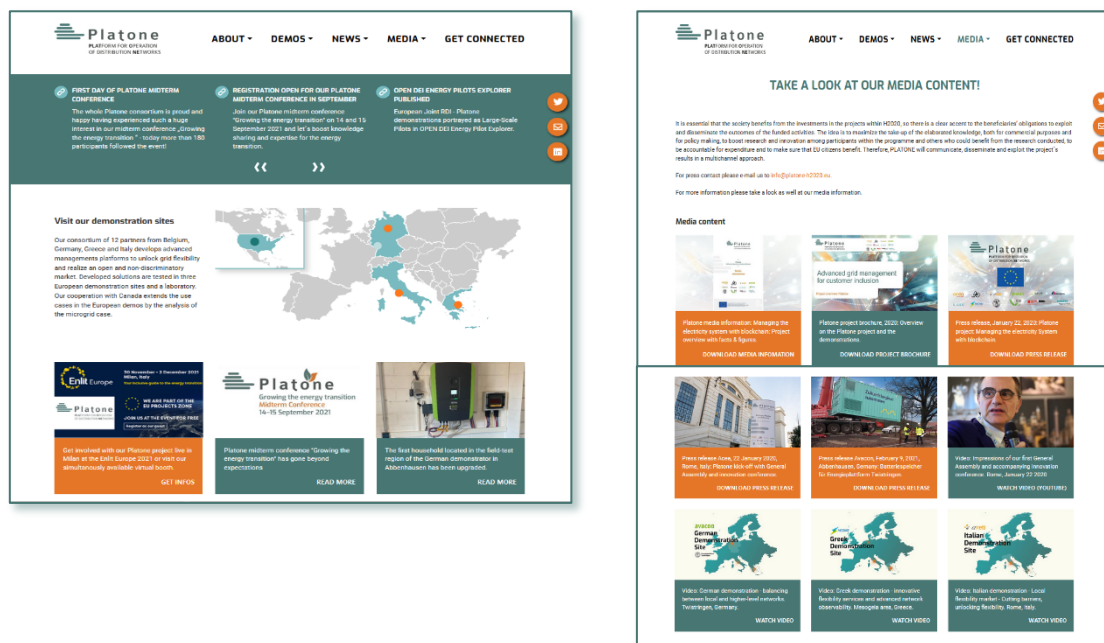
Figure 7 Platone project website

### 3.3.2 LinkedIn Group

The online professional network LinkedIn allows to reach a wide but also targeted audience in a professional context. Therefore, a Platone LinkedIn group was created to share content and actively connect with already established groups and professionals on Platone specific topics. The activities on the LinkedIn group as part of the social media activities are described more detailed in Chapter 3.4.4.

The Platone communication and dissemination team continuously posts and shares project activities, e.g. events, project milestones as well as tweets of partners, associated cooperation initiatives, e.g. BRIDGE activities of relevance for the Platone community.

The LinkedIn group was opened on 1st October 2019.

Name: Platone - PLATform for Operation of distribution NEtworks (H2020 funded project)

URL: **https://www.linkedin.com/groups/13766819**

Official members: 86 (November 2021)
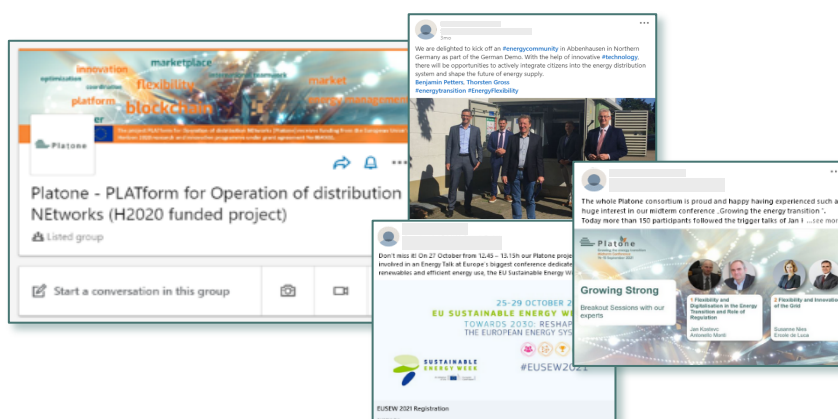


Figure 8: Platone LinkedIn group

### 3.3.3 Twitter

The social media platform Twitter allows for a broad audience of potential stakeholders of the Platone project like for example international and national media and press or representatives of the research-environment. Twitter is a good supplement to LinkedIn since LinkedIn focuses more heavily on a professional context whereas Twitter allows for a more grounded communication.



**Figure 9 Platone Twitter**

The Platone communication and dissemination team continuously shares project activities, e.g. events, project milestones as well as tweets of partners, associated cooperation initiatives, e.g. BRIDGE activities of relevance for the Platone community.

The Twitter profile of Platone was opened in June 2020.

Name: PlatoneH2020 (@PlatoneH2020)

URL: https://twitter.com/PlatoneH2020

Official followers: 103 (November 2021)

### 3.3.4 Print and Digital Materials

Based on the project design, several templates and materials have been created and yet under active usage, e.g. templates for slides, deliverables and milestones, set of basic slides, templates for social media posts, stand-up, general project information (digital version) or giveaways.

Further materials are planned or already under development. The ongoing COVID-19 pandemic makes it more likely to continue with a focus on digital versions of materials being used in the context of events as hybrid or fully virtual event formats are still very common. Digital materials will be complemented by haptic materials (e.g. printed flyers, giveaways) wherever face-to-face events are possible. To attract stakeholders with technical details, special communication/dissemination material will focus on the Platone Open Framework. Therefore, an interactive graphic as well as a simulation game is planned for

2022. Furthermore, an update of the general project information with focus on the three demonstrations is planned.



**Figure 10: Giveaway "seed card"**



**Figure 11 Platone stand-up**

### 3.3.5 Video

In order to present the project, high quality videos have been produced and released in August 2021, describing the general project context, the technologies developed and tested in the Platone trials, the expected results. The videos show the similarities as well as the uniqueness of the three trial approaches.

The videos are available on the Platone web site and social media and are being used in several contexts, e.g. at booths in fairs, as openers for events or adequate digital formats.



**Figure 12: Video of the German demonstration**

To the launch of the Italian demonstration during the Platone midterm conference in September 2021, a video "The flexibility data journey" about the flexibility data journey at the Italian demonstration was produced by the Italian partners. It is being used in further contexts wherever insights into the Italian demo are supporting dissemination activities – especially as a virtual alternative in times of the COVID-19 pandemic.



**Figure 13: Video to the launch of the Italian demonstration**

### 3.3.6 Publications

Key project and scientific publications are being published during the project to communicate and disseminate project results.

Examples for publications:

- Tailor-made articles or interviews with focus on success stories for target group relevant media.
- High-quality scientific papers with the focus on research findings to be published at renowned conferences and in scientific, peer-reviewed journals.
- Deliverables and reports with focus on project results.

Platone ensures open access (free of charge online access for any user) to all peer-reviewed scientific publications related to its results.

The publications are being distributed through appropriate channels, which comply with the publication terms of each consortium partner, the download area on the website, announcements via mailings and, if possible, specialist magazines or media, depending on subject and target group.

For the next project year at least two scientific publications are planned. For the upcoming project years effort will also be made to increase the visibility of Platone in special interest media from relevance for the target groups of Platone in form of articles or interviews.

### 3.3.7 Policy Briefs

Consortium partners will introduce Platone solutions to associations and framework setting institutions on national, European and worldwide level, mainly in Phases 2 and 3 of the project. For that purpose, a link between the task of WP8 "Fostering adoption of Platone results" (Task 8.2) and the subtask "Comparison of demo activities with the state of play in the regulatory framework at national and EU level" (Subtask 1.2.2) of WP1 is established and used as a base for the policy briefs.

E.DSO continuously monitors policy developments on the European stage and informs consortium partners on topics relevant to Platone project. A state of the situation was described in deliverable 1.3 "Overview of regulatory aspects that impact the solutions tested in the demos in European countries" within the WP1 "DSO Operation Strategies and Harmonization", submitted in August 2021 (M24) and this work will be continued by preparing regular policy briefs for the partners about legislative developments at EU level.

### 3.3.8 Media Kit

A Platone media kit provides relevant information for general media inquiries. It includes

- Contact (general, trial sites);
- Press release(s);
- Boiler plate;
- Message blocks;
- Images to portrait Platone approach and related content like demo sites;
- Relevant links (e.g. project videos (see Chapter 3.3.5)).

The media kit is continually updated following the project progress.

For all further media inquiries, the dissemination team provides the appropriate information and contacts within the consortium, e.g. for interviews etc.

The media is addressed by the dissemination team as well as by the Platone consortium partners, especially in relation to results of the demos by addressing local media.

### 3.3.9 Toolbox for Consortium Members

The toolbox for consortium members supports current communication activities. The set comprises among others:

- Project design guide including logo
- General presentation with a project overview
- Template for presentations
- A graphical resume of the project
- Templates and setting copy for general project material like roll-up
- Checklist for event management
- Media kit with tutorial and template press release, boiler plate etc.
- Template for reports on visited events
- Standard project description
- Leaflet/brochures summarising the main features of Platone.

## 3.4 Distribution

To spread Platone content a multichannel approach is chosen by using synergy effects wherever possible. Networking and cooperation play an essential role to distribute and disseminate later Platone results (see Chapter 3.6). Information on Platone gains a broader scope of public interest by promoting it through a number of web-based channels, channels of intermediaries like newsletter, backlinks,

events, cooperation and bi- or multilateral dialogues. These channels are regularly updated with non-sensitive and publicly available information on the progress and outcomes of the project and serve as a means for engaging with even more stakeholders.

### 3.4.1 Editorial Plan

An editorial plan helps to keep up a continuous spread of information on all relevant events, milestones and other highlights by coordinating the generation and distribution of content. Milestones and events are accompanied by communication measures like mailings, press releases, social media postings, news items at the project website, interviews etc. Therefore, the editorial plan comprises, i.e. project milestones or planned events to prepare the envisaged content per appropriate channel.
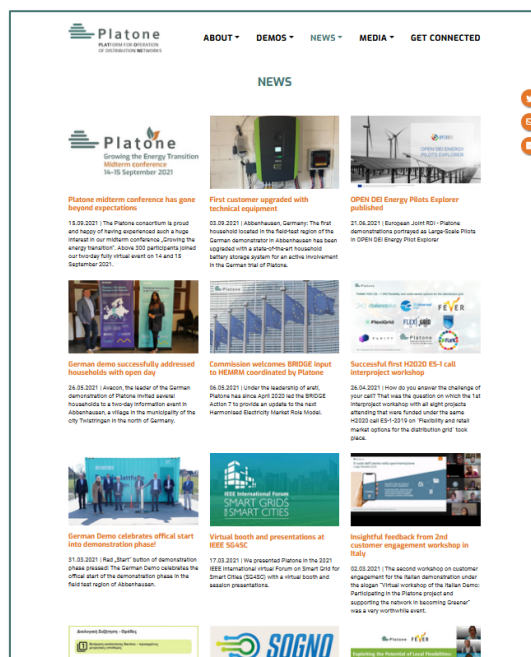


Figure 14 News items at Platone website

### 3.4.2 Contact Database

To distribute stakeholder-relevant content and to manage the stakeholder relationship, it is essential to establish a significant number of contacts of the main stakeholders and target groups by the end of phase 2 of the project. Platone contacts are composed of several data sets, including mailing lists of the consortium partners, contacts in the context of the series of co-creation events on user and stakeholder interaction, subscribers via Platone website, members of the LinkedIn group, participants of own events like the midterm conference with above 300 participants, ADB members, cooperation projects and partners and activities to establish the cross-project flexibility community. Therefore, several communication and dissemination activities are being used to invite stakeholders to subscribe to the mailing list to constantly increase the number of contacts.

A subscription form is active at the project website.

### 3.4.3 Mailings

Contextual mailings announce physical or virtual events and news about publications or milestones. Platone cooperates with partners to multiply the reach of distributed information, for instance with BRIDGE H2020 and other (see Chapter 3.6).

### 3.4.4 Online and Social Media Activities

Beyond being active on the project´s own website and social media networks, the communication and dissemination team checks other groups and personal, project or issue channels and uses them where

appropriate, e.g. LinkedIn groups of BRIDGE (@BRIDGE_H2020), H2020 and flexibility projects, consortium members etc. Every member of the consortium is welcomed to share issues round about Platone within their own networks where target groups are represented.

Social media networks deliver effective and, in comparison to other communication channels, easy to maintain means to engage with Platone stakeholders and target groups.

### 3.4.4.1 LinkedIn

Besides being active in the Platone LinkedIn group, all Platone consortium members and other actors who are active on LinkedIn are invited to share Platone content to their contacts or in other LinkedIn groups where target groups are represented. The dissemination and communication team is fully incorporating LinkedIn posts in the editorial plan (see Chapter 3.4.1) and supports partners with notifications on posts or providing input for posts. This includes the investigation and recommendation on appropriate project topic-related hashtags or occasion-related hashtags (e g. for special events) and handles (e.g. cooperation partner, speaker etc.) as well as visual material.

### 3.4.4.2 Twitter

Besides activities concerning LinkedIn, all Platone consortium members and other actors who are active on Twitter are invited to share Platone content to their contacts. The dissemination and communication team is fully incorporating Twitter posts in the editorial plan (see Chapter 3.4.1) and supports partners with notifications on posts or providing input for posts. This includes the investigation and recommendation on appropriate project topic-related hashtags or occasion-related hashtags (e g. for special events) and handles (e.g. cooperation partner, speaker etc.) as well as visual material.

## 3.4.5  Media

The consortium wants to ensure good visibility of Platone in the media, especially related to the demonstrations at local media level, but also in specialised media. The media are addressed by the dissemination team at transnational level as well as by the Platone partners, esp. in relation to the demonstrations and by addressing local media. Press releases inform about key steps and results especially of the demonstrations. Media activities are focussing on project findings that can tell a "story".

At local level, the demonstrations can attract media attention very well by organizing demonstrations related events, including press conferences and press releases (e.g. detailed report on German demo site in local German press "Weser Kurier" [6], describing the demo site and the role of Avacon but also explaining the Platone approach or the launch of the Italian demonstration with several reports in local media).

To attract technical and research related media at national or transnational level addressing the Platone stakeholders the following input can be provided: results of the project; invitations to events including press conferences, photos and graphics; articles written by Platone experts, interview partners; and organized visits for journalists.

Most obviously, extended events at demo sites involving external media partners are difficult to realise during the COVID-19 pandemic. Nonetheless, media can be directly contacted by each partner, by using existing media contacts of Platone partners and approaching other journalists and magazines working on Platone related issues.

For media requests, a transnational contact as well as national contacts of partners and trials is provided.

Press reviews are listed and reported as clipping reports for internal interest (not publishable due to copyrights).

## 3.4.6  BRIDGE

BRIDGE is a European Commission initiative which unites Horizon 2020 Smart Grid and Energy Storage Projects. Participation in BRIDGE increases the profile of projects and provides dissemination opportunities. Platone is represented in all four BRIDGE H2020 Working Groups (see Chapter 3.7.2). Platone is introduced like all involved projects at https://www.h2020-bridge.eu/participant-projects.

A BRIDGE newsletter is issued every 3 months (rather than every 6 months as was done until midst of 2021) about project news selected by an editorial team. Platone is continuously submitting news items to this newsletter. Project news, event announcements etc. are shared on BRIDGE Social Media channel Twitter @BRIDGE_H2020 and the LinkedIn Group "BRIDGE (Horizon 2020, LCE 6-10)".

The BRIDGE initiative regularly offers occasions contributing to events or joint session at events, e.g. the EU project zone at Enlit Europe 2021. Platone actively contributes to and joins such activities.

### 3.4.7  Channels of Intermediaries

Thanks to the well-connected Platone consortium, Platone has a good starting position to place Platone content at channels of intermediaries and cooperation partners (e.g. EERA, ERA-Net Smart Grids Plus) as well as an active role in other H2020 projects or initiatives (e.g. BRIDGE, OPEN DEI, ETIP SNET). This network is continuously established for Platone to use it on different levels and purposes (see Chapter 3.7.5). Intermediaries and cooperation partners can facilitate the communication and dissemination activities on different levels and purposes by being multipliers within specific stakeholder groups, by having influence on specific activities, by providing their channels for distribution of content or event related collaboration etc. Also, projects and groups where partners are already directly involved in are analysed and used for cooperation and distribution activities.

With the DSO Technical Platform being accepted as the SOGNO project within the Linux Foundation Energy (LFE) and with the cooperation with Canada Platone results have a great chance being visible in an international context.

## 3.5  Events and Educational Opportunities

Due to the COVID-19 pandemic, nearly all "real-life" events with multiple participants as well as educational opportunities like summer schools were totally cancelled, postponed or reorganised virtually. In the upcoming project year, a careful shift to at least hybrid events (combination of virtual and physical event) under strict hygiene regulations can be expected. Still, some event formats from focus meetings up to fair trades are conducted fully virtually.

Events of all kinds – whether they take place on- or offline, are an indispensable channel to distribute information about Platone, a place to initiate cooperation and collaboration activities and to make contact with potential stakeholders, potential users and customers. At events, most of the communications tools and channels merge - including presentations, ePoster sessions, moderation, co-organization with partners and intermediaries, booths, media presence etc.

Besides knowledge transfer and one-way distribution of information, different kinds of interactive events are a very effective way to attract, involve and link relevant stakeholders. Therefore, the consortium is organising interactive virtual or, if circumstances permit, physical meetings for both small and large numbers of participants to reach the relevant stakeholder groups and target audiences.

Platone topics are implemented in curriculum and postgraduate training (e.g. summer school RWTH, training at the Nyenrode Business School in the Netherlands, Ph.D. thesis in Canada).

A planning tool for internal and external events and activities serves as an overview of relevant events with priorities and is continuously updated with support of all partners to coordinate attendance and to avoid conflicts of dates. Major events will be announced per website, mailings etc.

Special interest in this context is given to the development of the COVID-19 pandemic and its impact on the planning of events and educational opportunities.

### 3.5.1  Platone Events

#### 3.5.1.1  Co-creation Events on User Interaction

A series of co-creation events for a user and target group-oriented design process has been developed to lay the ground for the development and assessment of Platone solution models. Stakeholder engagement strategies for the project are developed in task 1.5 of WP1, task 3.7 of WP3, task 4.5 of WP4. In these tasks the partners have defined approaches on harmonisation with customers', stakeholders' and partners' needs and expectations, which lays the ground for the entire development

and assessment of Platone solution models with the series of co-creation events on user interaction. They also have developed methodologies that assist in engaging the end-customers to voluntarily participate in the proposed demonstration solutions.

The series of co-creation events encompasses:

- an internal workshop on capacity building with all project partners to introduce User-Centric Design and prepare specific innovation activities to learn the basics of Design Thinking methods and mindset, brainstorming methods and to get insights into user comprehension, rapid prototyping, testing of ideas; sustainable innovation with economic, environmental and social impact.

- one innovation kick-off workshop per trial in preparation of the Platone field trials to identify user needs and expectations (participants: solution developers, potential participants of the trials and other typical users, representatives of consumer organizations).

- a series of innovation workshops for continuous user interaction with prototypes and advanced methods with representatives of consumer associations to identify their concerns, catch their expectations and develop them as partners for communication and dissemination.

- a last coordination workshop to complete the analysis of the lessons learned after the complete cycle of workshops at the end of the project.

Due to COVID-19 restrictions from spring 2020 on, virtual workshop formats have been developed to replace physical meetings. Besides that, one core experience (lesson learned) was that the initial roadmap for these workshops was too ambitious. The idea of early-stage user interactive workshops to test prototypes could not be realized, due to internal and framework conditions. Internally, trial site demos did not have prototypes or similar solutions/products ready for being tested at that early stage. Furthermore, feedback from the system relevant parties had to first be collected in order to define the framework and engagement options (active/passive) and their possible extent. Thus, the first engagement workshops (Italian and Greek demos) took place with system relevant stakeholders like trial-site integrated parties (DSO, aggregator, municipality operators, and commercial prostormers). Accordingly, later workshops took place with potential private and commercial end users, to discuss their options to participate in the specific demonstration and Platone.

In the end the series of co-creation events on user interaction has been successfully started, although with some delay, to put end customers as well as main stakeholders at the centre to investigate their needs and expectations with demonstration related workshops in Greece, Germany and Italy.

### 3.5.1.2 Open Days

The format of open day has been developed to create events, where stakeholder groups, in particular potential users of Platone outcomes, can test and discuss functionalities of selected results. Important feedback from users and involved stakeholders is expected to be gathered through the open days, which will help adapting the presented results and foster an increased exploitation level. The changing framework conditions due to the COVID-19 pandemic limited the options for effective stakeholder engagement, as physical contacts were limited or prohibited and the planning and holding of physical workshops were not possible from March 2020 on, as the rules in Germany, Italy and Greece prohibited physical events. According to discussions within the consortium (especially trial sites responsible partners), virtual events cannot replace physical events appropriately, in terms of the open days.

The first open day event could take place under strict hygiene measures at the German demonstration. The on-site event with in total 30 customers (residential consumers, prosumers, electric vehicle owner) and trial-site relevant stakeholders - like energy community operator, electrical distribution system operator - took place on the 25th and 26th of May 2021. Technical prototypes were presented to a broad audience and feedback collected with appropriate forms. With the comments and the feedback, Avacon could adapt the next steps in the project and collect more experience regarding the future stakeholder engagement process. For the Greek demonstration, on November 24 2021 the event "Platone Open Day: Innovation for Flexibility" was organized as an online event due to the worsening COVID-19 situation in Europe. Apart from the Platone solution, relevant H2020 projects were also presented to the audience and discussions took place concerning flexibility and data. The open day for the Italian demonstration is planned for December 13 2021. Accordingly, the milestone MS6 on having open days in all three trial sites will be achieved by the end of 2021.

**Figure 15: Open Day of the German demonstration**
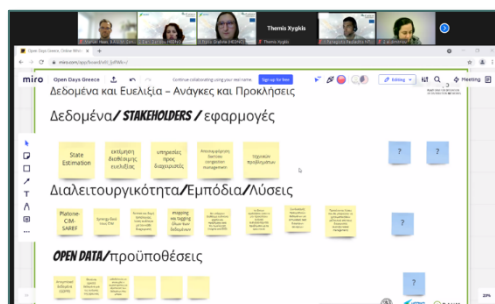


**Figure 16: Virtual Open Day of the Greek demonstration**

### 3.5.1.3 Exploitation Workshops

At the end of the project all findings relevant for the commercial exploitation and market take up of the R&D results of the project will be consolidated in one business plan for each of the individual exploitable results. At least, two (internal) exploitation workshops will be organized during the course of the project to identify the options, to align partners view and to prepare the corresponding plans. The first workshop is planned in the third quarter of 2022, following by a second workshop latest in project month 38.

### 3.5.1.4 Workshop for Family of Projects

In the context of the coordination with similar/twin projects, including similar projects in Canada (see Chapters 3.7.3 and 3.7.4), workshops are organised to allow fruitful exchanges between the various projects answering to the same call as Platone. The workshops enable the partners of the Platone consortium to exchange experiences on topics of particular interest with similar projects. Proper early communication and exchange of views ensure that the Platone project builds on other projects and not just replicates them. Particular attention is paid to projects in which members of the consortium are involved.

In April 2021 Platone hosted the first workshop for all projects funded under the H2020 call on Flexibility and Retail Market Options for the Distribution Grid (ES-1-2019). In this interactive session, 75 representatives of all eight projects E-Balance, EUniversal, FEVER, FLEXIGRID.eu, FLEXIGRID.org, PARITY, Platone, and X-FLEX funded under this call, as well as of Canadian Platone partner from the Northern Alberta Institute of Technology (NAIT), joined. The workshop was a great success and will be followed up with a workshop in December 2022 (project month 40). The goal is to dive deeper into the discussion with more time to exchange best practices and key takeaways from the learnings of the projects.

In addition to that, consortium partner E.DSO is planning a Women in Science, Technology, Engineering and Mathematics (STEM) disciplines initiative in 2022 by collaborating with the ES-1-2019 projects.

To strengthen the collaboration between Platone and its H2020 sister projects FEVER, edgeFLEX and DECIDE, a kick-off event for joint activities under the light of a flexibility community was co-organised by Platone in November 2020 (see Chapter 3.7.3).

### 3.5.1.5  Study Tours

Study tours will be organized for all types of interested stakeholder as soon as prototypes of solutions are implemented by the end of the project. The tours depend of course on the state of the ongoing COVID-19 pandemic situation. The tours tentatively take place at the trial sites and will feature guided demonstration of the functionality of selected result. If necessary, virtual tours will be organised.

### 3.5.1.6  Stakeholder Focus Event

To attract DSOs and promote the Platone Open Framework, two events for DSOs are planned to experience the laboratory setup of Platone components at RWTH Aachen University. RWTH laboratory focuses on the integration of the Platone Open Framework to produce a reference implementation which is deployed in the Platone demonstration sites across Europe and in Canada. At the later stages of the project, more components of Platone framework will be integrated in the laboratory prototype together with specific use cases of the demonstration sites depending on needs of DSOs.

The first event is planned for midst of 2022 with a fully virtual interactive format. A virtual simulation game is planned to let the participants actively get in touch with the Platone approach.

The second event is planned to be combined with the Platone final conference to take place physically in Aachen, Germany at the end of the project in 2023.

## 3.5.2  Summer Schools

As part of the dissemination activities towards the research communities, Platone topics are introduced in academic lecturing and research in the context of the RWTH Aachen University summer schools. Due to the COVID-19 pandemic the first of the two summer schools with Platone topics will take place in 2022, the second one in 2023.

## 3.5.3  Professional Courses

As part of creating awareness for the Platone approach and results, a course to enable Energy Sector professionals to update their knowledge promoting the use of the concepts developed in the Platone project, as part of the RWTH Academy Programme for life-long learning. First steps are taken between the German Association for Electrical, Electronic & Information Technologies (VDE), the Fraunhofer Society for the Advancement of Applied Research and RWTH to examine how bring Platone topics to the education of engineers in Germany. VDE wants to develop a new initiative about digitalisation, platforms, especially data platforms for utilities. VDE, Fraunhofer and RWTH have been developing a coordinated offer. For this it is, among other things, expected to result in a set of Ph.D. theses with a focus on Platone concepts and solutions. The first offer will be a course on cyber security in 2022. Probably one or two further offers will follow before the end of the project.

To foster a new generation of modern power engineers, Platone topics are being included in the university curriculum of RWTH Aachen University, including a new laboratory class on Grid Automation based on the application of typical international standards such as IEC61850 and coordinated also with the architecture of Platone, as well a new module on Digitalization for the group course "Future Energy Network" has been implemented.

RWTH is also developing a completely new Master level course under the title "Digital Energy" that will use significant input from the experience of Platone. The course will be ready by the end of the project in year 2023.

Beyond that project coordinator Prof. Monti will be presenting elements of digitalisation of energy in the Energy Delta Institute of Nyenrode Business School, Netherlands again in 2022 after having presented Platone findings also in 2020 and 2021.

## 3.5.4  Platone Conferences

The Platone consortium experienced a huge interest in our midterm conference "Growing the energy transition". Above 300 participants joined our two-day fully virtual event on 14 and 15 September 2021.

A final conference at the end of the project will be the entry point into the exploitation phase. The conference will inform about project results and future exploitation and activities of Platone solutions. A suitable concept will be elaborated in project year three.

### 3.5.5  Third-party Events

The Platone project was presented at several workshops and events of relevance in the first 25 months of the project.

3rd-party events which meet the topics of Platone are still very important and effective for dissemination and knowledge transfer to different stakeholders. National and international events of relevance, peer-reviewed scientific conferences, focus meetings with specialized industry initiatives with energy focus, virtual or physical exhibition stands in industry innovation events etc. are continuously checked on potential impact regarding the target groups, possible involvement (e.g. for sending a speaker or moderator, submitting papers, cooperation, exhibition etc.) and budget. Events of cooperation partners and intermediaries have a high priority to represent Platone.

For the upcoming project year there are several event opportunities and Platone has been already invited presenting Platone at stakeholder relevant workshops and events.

Beyond that, Platone have started being present with (virtual) booths at fairs as an important part of the preparations for the commercial exploitation activities. A presence at the Enlit Europe from 30 November until 3 December 2021 in the EU project zone is already prepared.

As mentioned above (see Chapter 3.6.4), the participation in these events still will depend on the development of the COVID-19 pandemic.



**Figure 17: Platone at several stakeholder relevant events**

## 3.6  Community Approach

A central part of the stakeholder relationship management strategy was to set up a Platone community. In the light of consortium partners having an active role in other H2020 projects and initiatives and the successful kick-offs for collaboration and cooperation activities in phase 1 of the project, the idea of the community evolved: Why not bring work on flexibility solutions to a new level of exchange? Why not join forces in reducing barriers in regulatory and standardization bodies, sustain discussion and community beyond project life times, act as a (European) family of projects and use project synergies? Why not collaborate instead of competing on engaging stakeholders and support each other to link to latest legal and regulatory frameworks (including Renewable and Citizen Energy Communities)? Several possible topics and starting points are being discussed like, e.g. a cooperative implementation of "Harmonized, Electricity Market Role Model" (HEMRM) (see Chapter 3.7.2), facilitating the trading of flexibilities on platforms in the energy sector, flexibility aggregation, market aspects, tools for DSOs (IT solutions) and organisational aspects (e.g. Local Energy Communities (LEC)).

The idea of this FlexCommunity is to be open for all stakeholders, who are interested in flexibility creation, management and trading; mainly it addresses flexibility research projects, representatives of research and industry, smart grids experts and smart grids institutions and initiatives and representatives of standardization and regulatory bodies. The aim is to share knowledge related to flexibility issues in order to foster transnational learning and maximize impact aiming to develop a market for flexibility. Furthermore, it focusses on collaboratively finding approaches and solutions to cross-cutting topics affecting many of the flexibility actors in order to achieve a maximum impact and create a cross-project, cross-border learning effect.

Supportive community activities foster the synergies among the trials and projects, beyond the impact of the individual projects, supporting the transfer of results and existing knowledge between the stakeholders. The community is built on the active contribution of its members, moderated by selected experts within the community and coordinated by representatives of participating projects. Special community events, e.g., workshops, sessions at events, are offered to strengthen the community, convey its messages and attract new members. With a joint online hub for the community, additional value can be provided such as a project and trial site data base, contact options etc.

The Horizon 2020 projects FEVER, edgeFLEX, DECIDE and Platone already confirmed to join in this effort in the beginning of 2020. A core team of these projects is promoting the FlexCommunity and bringing it up and running. A kick-off event in November 2020 hosted by BRIDGE and the SES taskforce on energy communities addressed the idea of a flexibility community. A pre-event to promote the FlexCommunity was organized in October 2021: Platone hosted an Energy Talk at the EUSEW 2021 Networking Village together with partner H2020 project FEVER arising the question of how energy democracy and system stability can go together. A constitutional meeting of one of the future subgroups "FlexOffer" is having their constitutional meeting in the beginning of December 2021 in the context of the Enlit Europe.

The launch of the so called FlexCommunity is planned for February 2022 with a virtual launch event.



**Figure 18: Logo of the FlexCommunity**

Above that the Platone consortium is continuously increasing the relationship and active involvement of the project´s main stakeholders and later target group with the several described event formats and educational offers, involvement in the demonstrations as well as the collaboration and cooperation activities.

## 3.7 Collaboration and Cooperation

The Platone consortium is an excellent starting point to connect to intermediaries and for cooperation due to its well-established collaboration network in Europe and beyond (e.g. cooperation with Canada), with contacts to many key players of the depicted target audience and partners involved in industry associations, standardization, European energy governance (e.g. ETIP) and research networks (e.g. EERA, ERA-Net Smart Energy Systems) as well as having an active role in other H2020 projects (e.g. OneNet ("OneNet - One Electrical Network Infrastructure for Europe", started on October 1, 2020), FEVER, edgeFLEX) or initiatives (e.g. BRIDGE, OPEN DEI). This network is established for Platone to connect to the project´s stakeholders on different levels and for different purposes. Intermediaries and cooperation partners are facilitating the communication and dissemination activities on different levels and purposes by being multipliers within specific stakeholder groups, by having influence on regulation and standardization activities, by providing their channels for distribution of content or event related

collaboration etc. There is an expected overlap between the groups involved in a community on flexibility issues (see Chapter 3.6) as well as on collaboration and cooperation.

### 3.7.1  Advisory and Dissemination Board

Platone has established a promising advisory and dissemination board (ADB) of leading representatives of the critical energy infrastructure and ICT sectors, a total of 18 members.

The ADB advises the project on strategic directions in the sector to assess the overall approach, use cases and field trials and their implications. ADB meetings also serve as an opportunity to identify changes in the framework and new challenges and opportunities. In addition, the ADB advises in the communication of results to stakeholders and helps in opening dissemination paths in preparation for exploitation. Members of the ADB support the communication of the project results and insights and thereby ensure European-wide acceptance and usability of the Platone project outcomes. ADB members are invited to selected Platone driven events (e.g. family of projects joint online event in November 2020 or the Platone midterm conference, September 2021, launch event of the FlexCommunity February 2022).

The ADB meets annually. The ADB kicked-off with a first meeting in November 2020. The second meeting is planned for March 2022. While the first meeting focused on platform's architecture, the next meeting will focus on standardization. All recommendations of the ADB members are considered for the upcoming project phases.

### 3.7.2  Contribution to European Joint RDI efforts

Several members of the Platone consortium are actively involved in European joint RDI efforts.



**Figure 19: European joint RDI efforts**

Three joint RDI efforts are playing an important role for the Platone project in the upcoming project phase:

BRIDGE, the initiative of the European Commission, unites Horizon 2020 Smart Grid and Energy Storage Projects. Four working groups represent the main areas of interest: "Data Management", "Business Models", "Regulations" and "Customer Engagement".

Several partners of the Platone project are actively involved in the activities of the BRIDGE working groups. This synergy ensures that the main findings of the project will be transferred in the documents that will be elaborated in the future activities of BRIDGE WGs. Platone contributes to the activities the BRIDGE working groups and to the updates of the existing BRIDGE documents and provides input for the next deliverables that will be drafted.

Around 10 consortium members are participants in BRIDGE working groups and associated actions and task forces. In addition, Prof. Monti, RWTH is the Co-chair of the task force on Research and Innovation priorities, Ercole de Luca, areti, has been leading Action 7 "Harmonised Electricity Market Role Model – HEMRM" and Ludwig Karg, B.A.U.M. Consult, is the Co-Lead of the task force Energy Communities.

Started already in the first project year, the following activities have drawn special attention:

- Within the Data Management working group Platone proposed a new approach to the creation of a database of use cases. The goal of this BRIDGE task force is to create a European repository of all the use cases to facilitate the exchange of knowledge among projects. Platone developed as part of its work a toolchain totally open source that makes this repository possible. The approach has been proposed to the WG, which adopted the solution as standard. Platone is still supporting the advancement of the tool and the creation of new features. The Smart Grid Use Case Repository is available online [19].
- In May 2020 the BRIDGE Working Group on Regulation started new action on "Harmonized, Electricity Market Role Model (HEMRM)". The goal is a common understanding of an electricity market model according to the new provisions of the Clean Energy For All Europeans package between related EU projects, the BRIDGE initiative, the system operator's associations, citizen energy communities and the EU institutional bodies like the European Commission, Agency for the Cooperation of Energy Regulators (ACER) and Council of European Energy Regulators (CEER). Platone was assigned the lead of this ambitious scheme. Under the leadership of areti and with the involvement of the whole Platone project management team (PMT), an updated version of the Harmonized Electricity Market Role Models (HEMRM) originally prepared by ENTSO-E was developed. After several months of work of the joint team between ENTSO-E - ebIX - EFET, EU Bridge Program and European DSO Associations, the final version of the "EU Bridge HEMRM Differential Analysis" was sent to the European Commission in November 2021 for their final approval. The document reports in its first part the vison of EU Bridge projects about the needs of update of the HEMRM, and in its second part the results of the sharing of this view with ENTSO-E - ebIX - EFET representatives. The document has to be intended as a picture of the analysis and the discussions had about the possible impact of local / distributed flexibility services on the HEMRM, aiming to be useful for future developments and implementations.
- Within the Task Force on Data Architecture, Platone contributed the definition of the architectural picture that has been presented at the BRIDGE General Meeting 2021. Within the Task Force on Common Information Model (CIM) application Platone participated to the preparation and processing of the analysis of the use of the CIM standard within the H2020 projects. Prof. Monti co-chaired the task force that analysed the concrete results of the complete set of projects of H2020 represented in BRIDGE to identify gaps and opportunities to be considered for the upcoming Horizon Europe. The work has been summarized in a comprehensive report that has been already released to the European Commission.
- Representing i.a. Platone, Ludwig Karg from B.A.U.M. together with Leen Peters (ThinkE) chairs the taskforce on Energy Communities. The taskforce liaises with a twin taskforce of Joint Programming Platform ERA-Net Smart Energy Systems (JPP SES) and operates a knowledge platform on expera. Surveys have been done with BRIDGE and JPP SES projects to collect examples of Energy Communities, identify the support needs to develop such structures and better understand the regulatory conditions and tariff specifics in EU countries.
- Within the BRIDGE subgroup on customer engagement, partner B.A.U.M. and further Platone representatives have been paving the path for a process developing a coherent and coordinated definition of stakeholder types, their possible roles and parameters for engagement.
- Platone contributes to the BRIDGE Task Force joint communication which coordinates joint activities regarding communication or at events.

OPEN DEI,

OPEN DEI is a Horizon 2020 Coordination and Support Action (CSA) to support pilot activities and knowledge transfer across different sectors - aligning Reference Architectures, Open Platforms and Large-Scale Pilots in Digitising European Industry. It aims at leveraging synergies, identifying gaps, sharing best practices, reinforcing regional/national relationships as well as putting in place the necessary joint measures to implement common dissemination, communication, training and exploitation action plans among the Innovation Actions (IA) selected projects and their Large-Scale Pilots (LSPs). OPEN DEI has created several working groups and task forces related to specific topics to serve the interest of the involved projects such as Platone. The Automation of Complex Power

Systems Institute at RWTH Aachen University, directed by project coordinator Prof. Monti, is responsible for the Energy Domain in OPEN-DEI.

Platone supports OPEN-DEI's work to benefit from it actions and contribute to improve the synergies between project by providing information and participating in working groups. The active participation of Platone partners allows continuous exchange of the best practices with other projects focused on digitalisation and put in place the necessary joint measures to implement common dissemination and communication.

Platone partner ENG is leading the OPEN DEI Energy WG2 on Shared Infrastructures. E.DSO is participating in Energy WG1 on Use cases. BAUM is participating in Energy WG3 on Linking Eco-systems and ENG is participating in Energy WG4 on Technical Topics.

In the Energy WG1 on Use cases Platone has contributed to the survey on Open-Source Software. The conducted survey is allowing analysis that will lead to a dedicated workshop; a report/white-paper is planned for 2022. Above that the Energy WG1 in 2022 plans to explore the Gaia-x use-cases description models, starting from the one on Electric-Vehicle applications.

The Energy WG3 on linking eco-systems will organize a further dedicated full-day workshop in spring 2022 on a specific theme.

The main tangible results of OPEN DEI are constituted by cross-domain (above energy healthcare, agri-food, manufacturing) Task Forces, which lasts around 6 months and publish related papers: Task Force 3 and Task Force 4 are related to Architecture/Data, are going to start end of 2021 and will involve a Platone representative.

OPEN DEI is about to start collaborating with Big Data Value Association (BDVA), an industry-driven international not–for-profit organisation with more than 230 members all over Europe and a well-balanced composition of large, small, and medium-sized industries as well as research and user organizations, and the Alliance for the Internet of Things Innovation (AIOTI) for preparing two reports on the applications of Data Spaces and interoperability which opens an opportunity to provide contributions from Platone perspective, i.a. to describe the project applications. Partner ENG will be involved.

ETIP SNET, the European Technology and Innovation Platform Smart Networks for Energy Transition, unites a multitude of stakeholders and experts from the energy sector. It provides input to the SET Plan action 4 which addresses the technical challenges raised by the transformation of the energy system. There are five working groups and the National Stakeholder Coordination Group (NSCG).

Several partners of the Platone project are actively involved in the activities of the ETIP SNET working groups. This synergy ensures that the main findings of the project will be transferred in the documents that will be elaborated in the future activities of ETIP SNET white papers, roadmaps and implementation plans. E.DSO is member of the governing board of ETIP SNET, providing a further valuable possibility to increase Platone impact and visibility. Members of Platone project are active in WG1 and WG4. Within WG1, RSE is mostly active for the preparation on the report on sector integration. RWTH provided also input in relation to the use of SGAM approach for multi energy systems. Platone project coordinator Prof. Monti has been appointed as leader of the Task Force 1 for the WG4 for 2022. The mission is to provide feedback to the EC on the digitalization strategy and to accompany the EC in the further process.

### 3.7.3  Family of Projects

Above the consortiums contribution to established European joint RDI efforts (see Chapter 3.8.2) Platone fosters temporary or long-lasting exchange on special topics with other H2020 projects responding to the same call, especially paying attention to projects where partners overlap. In this way, the comparability of Platone with the other projects will be ensured, for the greatest added value for the call as a whole. The exchange of experience intends to ensure that Platone builds on rather than replicates previous H2020 projects. To ensure the collaboration, at least two workshops are organized to allow fruitful exchanges between the various projects answering to the same call (see Chapter 3.5.1.4). The first workshop was successfully organized in April 2021.

A collaboration between Platone and H2020 sister projects FEVER, edgeFLEX, DECIDE kicked off with a joint online event on Nov. 19 2020, hosted by BRDIGE and the SES taskforce on energy communities. Platone was co-organiser of the event. The aim was to strengthen the collaboration under the light of

local flexibilities and its potential exploitation through energy communities. The event addresses the idea of a flexibility community and is therefore closely related to the community approach described in Chapter 3.6.

Special synergies have been identified with the projects EUniversal [6], which aims to implement the Universal Market Enabling Interface (UMEI) concept and develop solutions to ensure effective implementation of an interoperable flexibility ecosystem across Europe, and Platoon [7], which aims to digitalise the energy sector, enabling thus higher levels of operational excellence with the adoption of disrupting technologies. This cooperation materialises in technical workshop and in a cross-participation in the advisory boards. Massimo Bertoncini from partner ENG participates also in the BD4NRG [8], BRIGHT [9] and STORE&GO [10] projects, resulting in a multi-project contribution and collaboration with Platone. The focus of the activity is mainly on scaling up models from these projects.

Currently several new projects have been submitted to the EC having committed to use the same architecture as the Platone project. It is expected that there will be clear starting points for a strong collaboration in 2022 with those projects being accepted by the EC.

### 3.7.4 International Cooperation

Platone has established a cooperation with the Distributed Energy Management Initiative (DEMI) in Canada, a partnership between Northern Alberta Institute of Technology (NAIT), ATCO, Siemens and the Future Energy Systems research programme at the University of Alberta. It was facilitated by the strategic alliance between RWTH and University of Alberta and by the fact that SIEMENS is partner in Platone as well as in DEMI.

With this cooperation the Platone consortium makes the Platone platform available to DEMI for testing within a microgrid scenario to understand possible adaptations and to extend the set of use case scenarios for Platone to microgrid flexibility. Therefore, the University of Alberta has brought up the Platone approach in the project "Towards future interconnected electric system", funded in Alliance Grant of the Natural Sciences and Engineering Research Council of Canada (NSERC), the major federal agency responsible for funding natural sciences and engineering research in Canada and NAIT. The testing area is a microgrid within the Centre for Grid Innovation (CGI), which was initiated by DEMI 2018 and is located at NAIT. In this "plug-and-play", microgrid energy companies can develop, test and validate their technologies under realistic field conditions.

With a kick-off meeting in November 2020 three action points for the future cooperation were determined: "Customer engagement", "Platform technology" and "Comparison of regulatory schemes Canada/Europe". In addition, the industry boards will be invited to join an event of the Linux Foundation Energy.

Further, the following activities are being performed in support to or as an output of the cooperation:

- DEMI representatives join the Advisory and Dissemination Board of Platone.
- Universities on both sides share data in support of the scalability analysis.
- A joint workshop will be organized in the middle of the project (ca. autumn/winter 2021) to study the market aspects.
- Scientists will be exchanged using funding from the universities already running such a programme.
- Thanks to the links established between RWTH and the University of Alberta in Platone, RWTH and the University of Alberta have submitted an international graduate school programme. The programme unfortunately has not been granted but the universities are planning a resubmission considering the comments of the reviewers.
- Knowledge and insights in relation to the Platone project are constantly exchanged and reviewed between the partners (e.g. presentation of the Platone project to a broader Canadian electrical engineering audience at the IEEE Canada Power and Energy Conference (EPEC) 2020 [7].

For other countries, Platone uses the opportunities to present Platone at the international events for example:

- ISGAN (International Smart Grids Action Network) [8], a strategic platform to support high-level government attention and action for the accelerated development and deployment of smarter, cleaner electricity grids around the world
- Mission Innovation [9], a global initiative working to accelerate clean energy innovation

Mainly consortium partners B.A.U.M. and RSE are heavily involved in such international organizations.

Consortium partner RWTH led the creation of a new project called SOGNO [10] within the Linux Foundation Energy (LFE), which is the key component of the DSO Technical Platform in Platone. In November 2020 the software of the Platone DSO Technical Platform has been accepted as a project in the Linux Foundation Energy, which brings Platone to a world-wide audience. This means that the Platone DSO Technical Platform will benefit from a software development community, particularly bridging to activities in the USA and Australia that are going in the same direction. This activity got an unprecedented visibility including an interview with Prof. Monti for the major international magazine Forbes [11]. Project coordinator Prof. Monti, RWTH, has been recently selected as chair of the Technical Activity Council of LFE as proof of the key role of SOGNO. Especially partner RWTH is contributing from Platone perspective. For 2022 a first commercial adoption of the architecture of the LFE SOGNO project which includes the extensions of Platone is expected.



**Figure 20: Logo of the LFE project SOGNO**

### 3.7.5 Intermediaries

Intermediaries are facilitating the dissemination activities by being multipliers within specific stakeholder groups. They are involved in different ways, following the stakeholder relationship management strategy.

To attract suppliers of the energy industry to experience the new solutions and to consider adopting them, Platone mainly addresses this target group via associations and other intermediaries. Therefore, activities with the following organizations and initiatives are running or planned:

- Joint activities with European Institute of Innovation and Technology (EIT) to reach out to Startups and innovative SMEs EIT as a unique EU initiative spurs innovation and entrepreneurship across Europe. Its Knowledge and Innovation Communities (KICs) bring together businesses, research centres and universities. Platone will invite mainly KIC InnoEnergy and KIC Digital for joint implementation of activities.
- Joint activities with business-oriented institutions on European level like T&D Europe and Digital Europe (representing 61 major technology companies and 37 national trade associations) and Executive Agency for Small and Medium-sized Enterprises (EASME) for involving SMEs and start-ups etc.
- Collaboration with specialized industry initiatives with energy focus and initiatives using an open software platform that supports standardized building automation and energy management. Amongst them are the EE-Bus initiative (mainly linking to smart homes), Open Gateway Energy MAnagement (OGEMA) as well as the industry consortium of the FEN research campus (amongst others involving promoters of DC energy grids), where Platone was presented in a general meeting.
- Collaboration with the Linux Foundation Energy (LFE) in the context of the LFE SOGNO project (see Chapter 3.7.4)
- In order to build the representative networks that will be used in the SRA analysis, contacts with the Joint Research Centre (JRC), the European Commission's science and knowledge service, have been established. Based on the experiences coming from the "DSO Observatory" project of the JRC [17] and other European works, partner RWTH has been established contacts with the JRC for having access to the EU JRC database of representative networks. Partner areti

was involved in the compilation of the JRC report and in the mapping demo assets, based on the extraction of data regarding its grid through Geographic Information System (GIS). Regarding the analysis of the replicability potential of the results in the project in Canada it was discussed with the University of Alberta about the information that will be required to analyse the scalability and replicability potential in Canada.

# 4 Controlling of Communication Activities

## 4.1 Key Performance Indicators

All communication measures are checked regularly to see how effectively and efficiently input and outflow correlates. Therefore, key performance indicators (KPIs) are set up, which are specific, measurable, attainable, relevant and time-bound and are derived from the strategic approach related communication objectives described in Chapter 2.3.

These KPIs are analysed periodically on the one hand on the basis of indicators and on the other hand in relation to the budget plan in the forefront of the annual revisions of the communication and dissemination plan. The results will be taken into account to adjust and adapt the strategy approach, the correlated measures and allocated budget wherever necessary.

### 4.1.1 Creating Awareness of Platone Project and Results

| Creating awareness of Platone project and results | | |
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| To create the necessary tools and interfaces to bring about opportunities for constructive communication and engagement between the project and a broad range of stakeholders. | | |
| **Objective** | **Status** | **Summary of achievements** |
| 1 launched project website based on a joint project design, with a constantly increasing and up-to-date high-quality content based on the progress of the project (link list, publications on results, trial description etc.) | Work in progress | The Platone website launched in November 2019.<br><br>URL: **www.Platone-h2020.eu**<br><br>Off page and on page SEO ensures high visibility for online content. An annual revision of the website ensures its topicality and focus. In addition, partial extensions are implemented as ready or as needed (e.g. ADB section, Use Cases demonstrations). Links to Platone social media channels are prominently provided. Further content is continuously provided according to the project progress. |
| 1 launched community hub within the second project year | Work in progress | The launch of the cross-project flexibility community platform, planned for autumn 2021, was postponed to the first quarter of 2022.<br><br>On the 19th of November 2020 a kick-off event to merge the work on flexibility solutions to a new level of exchange in form of a cross-project flexibility community was co-organised by<br><br>Platone. Project members of the EU H2020 projects of DECIDE, edgeFLEX and FEVER participated. Participants agreed on follow-up workshops to further discuss the different topics.<br><br>A pre-event to promote the flexibility community hub, to let community grow and to involve already active participants, further stakeholders and potential members took place in form of a EUSEW Energy Talk in October 2021.<br><br>The constitutional meeting of the user group on FlexOffer will take place in the context of the Enlit Europe 2021 in Milan. |

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| 3 flyers, 1 for each of the three trials, that show an overview of the corresponding trial (digital, print on demand) | Work in progress | A first digital edition of a project brochure was published in 2020. It comprises a general project overview and a comprehensive overview on each demonstration (www.platone-h2020.eu/media/Media_content)<br><br>An updated version of a project brochure for the demonstrations is being prepared. |
| High-quality videos | Completed | Video on each demo published in August 2021 (www.platone-h2020.eu/media/Media_content). |
| 6 released and sent press releases of key project milestones to specialised and general media channels | Work in progress | 4 press releases were released and sent (www.platone-h2020.eu/media/Media_content).<br><br>Project information and milestones were published in general media channels.<br><br>The impact is monitored with internal clipping reports. Several news items in local as well in leading media have been published, esp. related to the demonstrations. |
| 1 online available press/media kit | Work in progress | A media kit with general project information is available online (www.platone-h2020.eu/media/Media_content). The media kit will be updated according to the project progress. |
| 1 LinkedIn group open with regular activity by the Platone consortium and 2 posts by Platone consortium members on LinkedIn per month | Work in progress | The LinkedIn group was opened on 1st October 2019.<br><br>Name: Platone - PLATform for Operation of distribution NEtworks (H2020 funded project).<br>URL: **https://www.linkedin.com/groups/13766819**<br><br>Members project month 27: 86<br><br>Content is continuously provided according to the project progress. |
| 1 Twitter channel open with regular activity by the Platone consortium and 2 posts by Platone consortium members on Twitter per month | Work in progress | The Twitter profile of Platone was opened in June 2020.<br><br>Name: PlatoneH2020 (@PlatoneH2020)<br>URL: **https://twitter.com/PlatoneH2020**<br><br>Followers project month 27: 103<br><br>Content is continuously provided according to the project progress. |
| 10 successful talks in workshops and international events of reference | Work in progress | The Platone project and its activities have been successfully presented in > 10 workshops and international reference events. This will be further pursued.<br><br>Selection of events: |

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| | | Workshop with DSO associations on the role of local flexibilities for stabilising the grid "Flexibilities for a stable energy system: don't talk - start harvesting!", in the context of the European Utility Week,12.11.2019, Paris, France, Moderation of the workshop & presentation of Platone by B.A.U.M. |
| | | 2nd Workshop on Flexibility Markets of the Future and TSO-DSO Cooperation,13.02.2020, Brussels, Belgium, presentation by RWTH. |
| | | OPEN DEI 1st Energy Domain Workshop, 06.04.2020, presentation by ENG. |
| | | Linux Foundation Energy - Architecture group, 06.04.2020, online, participation/presentation by RWTH. |
| | | OPEN DEI Webinar: The role of the Reference Architectures in data-oriented Digital Platforms, 28.05.2020, online, presentation by RWTH. |
| | | 20TH IEEE Mediterranean Electrotechnical Conference - IEEE MELECON 2020, 16.-18.06.2020, Palermo, Italy, presentation by ENG. |
| | | FIWARE energy day, 22.06.2020, online, presentation by RWTH. |
| | | EON Energy Innovation Days, 05-08.10.2020, online, presentation by Avacon. |
| | | IEEE Canada Power and Energy Conference 2020, 09-10.11.2020, online, presentation by RWTH (Keynote). |
| | | Exploiting the potential of local flexibilities: the role of Energy community: Joint online workshop H2020 projects FEVER, Platone, edgeFLEX and DECIDE, hosted by BRIDGE and SES taskforce on Energy community, 19.11.2020, online, presentation by RWTH and EDSO, moderation by B.A.U.M. |
| | | "Digitalisierung der Energiewende: Potentiale und Geschäftsmodelle", Franco-German Office for the Energy Transition (Deutsch-französisches Büro für die Energiewende,DFBEW) in partnership with E-World trade fair, 11.02.2021, online, presentation by Avacon. |
| | | 1st E.DSO Projects in the Spotlight event "DSOs at the centre of Data Exchange", 10.03.2021, online, presentation by Areti. |
| | | 2021 IEEE International Forum on Smart Grids for Smart Cities, 17.-23.03.2021, online, presentations by Avacon & E.DSO; virtual booth. |
| | | ETIP SNET 11th Regional Workshop, 21.04.2021, online, presentation by RWTH. |

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| | | LF Energy Spring Summit 2021, 14.04.2021, online, Presentation by RWTH |
| | | H2020 ES-1 call Inter-Projects Webinar, 26.04.2021, online, Presentation by EDSO. |
| | | InnoGrid, 04. & 11.06.2021, online, presentation by HEDNO. |
| | | Seminar "Blockchain & innovation for digital society" under the project FIT EUROPE, 10.06.2021, online, presentation by ENG. |
| | | EUSEW 2021 Energy Talk, 27.10.2021, online, presentation by RWTH. |
| | | NEIS 2021 – Sustainable Energy Supply and Energy Storage Systems, 13. & 14.09.2021, online, keynote by RWTH. |
| | | Webinar AEIT & UniTrento "Progetti pilota per l'approvvigionamento di servizi ancillari locali", 08.10.2021, online, presentation by Areti. |
| | | IEEE International Conference on Communications, Control, and Computing Technologies for Smart Grids, 25–28.10.2021, hybrid in Aachen, Germany. Game Changer Roundtable "5G technology", presentation by RWTH; Game Changer Roundtable "Open source for energy", presentation by Areti & ENG. |
| | | Ericsson Webinar "How can 4G and 5G support the transformation of energy systems", 11.11. 2021, online, presentation by RWTH. |
| 1 successful series of co-creation events on user interaction including: | | |
| - 1 successful workshop on capacity building (internal) to introduce user-centric design and specific innovation activities to all trial site responsible partners | Completed | The capacity building workshop was hold on 05-11-2019 in Berlin, Germany. |
| - 3 successful virtual or physical kick-off workshops, one per trial with potential customers (private, commercial) and other relevant stakeholder groups to engage a critical number of private customers in Platone Project and with feedback of > 5 participants of the workshop | Completed | German demo: <br><br> The first workshop on customer engagement of the series of co-creation events on user interaction was held on 18 August 2020, Syke, Germany, presenting the German demo to regional fitters resp. installers. <br><br> A further workshop was the kick-off workshop with Rolls-Royce Solutions Berlin GmbH, 08.07.2020, Helmstedt, Germany. |

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| | | The involvement of municipal representatives was organized, i.a. on 08.05.2020, 20.05.2020 and 30.09.2020 in Twistringen, Germany. |
| | | Italian demo: |
| | | On 2 March 2021, the first workshop on customer engagement of the series of co-creation events on user interaction was held virtually with > 10 residential customers and building managers representing additional end-users actually interested in taking part in the Italian Demo, from the Centocelle and Tor di Valle district areas. About 9 customers already signed their participation in the Platone project. |
| | | Greek demo: |
| | | The kick-off event for the Greek Demo was part of the Platone Open Day on 24.11.2021. |
| | | For the purposes of the Greek pilot there is no active participation of consumers, due to regulatory obstacles. So, during the event consumers were informed about the flexibility schemes that are part of the Greek demo and their feedback was gathered. |
| - 3 successful virtual or physical follow-up workshops, one per trial with potential customers (private, commercial) and other relevant stakeholder groups to engage a critical number of private customers in Platone Project and with feedback of > 5 participants of the workshop | Work in progress | German demo: A follow-up workshop on customer engagement of the series of co-creation events on user interaction was held on 21 October 2020, Twistringen, Germany with the Local Council of Twistringen. |
| - 3 successful virtual or physical innovation workshops, one per trial, with a user and target group-oriented design process e. g. prototyping solutions with design thinking approach | Completed | German demo: The innovation workshop on customer engagement of the series of co-creation events on user interaction was held 21 January 2020 attached to the General Assembly in Rome. Italian demo: The innovation workshop on customer engagement of the series of co-creation events on user interaction under the title "Optimized grid management and flexibility market: the prosumer's role", was divided in two parts and held on June 18th and 25th 2020. The first workshop was an informational workshop for stakeholder groups (except end customers), interested and relevant for Platone project. The second workshop had systemic character and discusses actual and future roles in the energy |

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| | | system with relevant stakeholder groups (except end customers) in an interactive format. These workshops took place with more than 30 participants in total. The third Workshop was designed for end customers only. In this workshop their role and active/passive options for participation was discussed. In total feedback from more than 5 participants was gathered. |
| | | **Greek demo:** |
| | | The innovation workshop on stakeholder engagement of the series of co-creation events on user interaction was held on February 18th 2021 with around 30 participants in total discussing outcomes of the demo and options for passive participation. Feedback from more than 30 participants was gathered. |
| 1 final virtual or physical coordination workshop to complete the analysis of the lessons learned after the complete cycle of workshop (MS15) | Pending | |
| Well accepted open days at all 3 trial sites presenting and discussing prototype solutions (MS6) | Work in progress | **German demo:** <br><br> 25 and 26 May 2021, Abbenhausen, Germany: Open Day with over 50 participants from households, local councils. <br><br> **Greek demo:** <br><br> 24 November 2021, online: Virtual Open Day with 38 participants. <br><br> **Italian demo:** <br><br> Planned for December 13 2021. |
| 4 well-visited virtual or physical study tours to trials sites with more than 100 participants altogether | Pending | Study tours will be organized for all types of interested stakeholder as soon as prototypes of solutions are implemented, by the end of the project. |
| 2 successful virtual or physical exploitation workshops for the commercial exploitation and market take up | Work in progress | The workshops will be organised due to a more advanced state of the Platone project. The organisation and conceptualization of these workshops require mature and concrete project results. These results have been collected for the submitted deliverable D8.5 "Exploitation and marketing plan for the involvement of partners and future customers (v1), which are the basis for the organization of the workshops The workshops will be conducted in the second part of the project. |

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| 1 successful midterm conference in Brussels or on virtual level | Completed | The midterm conference under the title "Growing the energy transition" was successfully held fully virtual on 14.9. - 15.9.2021 with over 300 participants all together. |
| 1 successful final virtual or physical event at the end of the project | Pending | Conception and preparation will start end of 2022. |
| ≥ 1 documented impact to the BRIDGE H2020 Working Groups | Work in progress | Several partners of the Platone project are actively involved in the activities of the BRIDGE working groups, actions and task forces with participating or/and chairing. |
| | | In May 2020 the BRIDGE Working Group on Regulation started new action on "Harmonized, Electricity Market Role Model (HEMRM)". Platone was assigned the lead of this ambitious scheme. A final version of the "EU Bridge HEMRM Differential Analysis" was submitted to the EC in Nov 2021. |
| | | Platone provided the open-source software approach adopted in BRIDGE for the creation of the use case database to be later adopted as standard European solution. |
| | | Additionally, further contributions were made within the Task Force on Data Architecture: Platone contributed the definition of the architectural picture that has been presented at the BRIDGE General Meeting 2021. |
| | | Task Force on Common Information Model (CIM) application: Platone participated to the preparation and processing of the analysis of the use of the CIM standard within the H2020 projects. |
| | | Prof. Monti co-chaired the task force on R&I priorities that prepared a full report on the status of H2020 and future perspectives for Horizon Europe. |
| | | Representing i.a. Platone, Ludwig Karg from B.A.U.M. together with Leen Peters (ThinkE) chairs the taskforce on Energy Communities. The taskforce liaises with a twin taskforce of Joint Programming Platform ERA-Net Smart Energy Systems (JPP SES) and operates a knowledge platform on expera. Surveys have been done with BRIDGE and JPP SES projects to collect examples of Energy Communities, identify the support needs to develop such structures and better understand the regulatory conditions and tariff specifics in EU countries. |
| | | Within the BRIDGE subgroup on customer engagement, partner B.A.U.M. and further Platone representatives have been paving the |

| | | path for a process developing a coherent and coordinated definition of stakeholder types, their possible roles and parameters for engagement.<br><br>Further impact is expected. |
|---|---|---|
| ≥ 3 contributions to the BRIDGE H2020 Newsletter | Work in progress | BRIDGE Newsletter #9 – June 2020: Platone news, topic "HEMRM"<br><br>BRIDGE Newsletter #8 – December 2019: Platone news, topic "start of the project"<br><br>For the reissue of the BRIDGE newsletter two further contributions were submitted but not published (Q2/2021: SOGNO Platform architecture used by Platone accepted in Linux Foundation Energy & Successful first H2020 ES-1 interproject workshop).<br><br>Further contributions will be made. |
| ≥ 2 documented contributions to all BRIDGE H2020 events during the project where input of Platone is required | Work in progress | Platone was represented at the BRIDGE General Assembly 2020 and 2021.<br><br>Platone has a project desk in the EU project zone at the Enlit Europe, 30.11. – 02.12.2021.<br><br>On 01.12.2021 a partner ENG participates in the EU project zone´s Live Hub "Interoperability and data exchange to support digitalisation" at the Enlit Europe.<br><br>Further contributions are expected. |
| Significant increasing number of contacts with the main stakeholders and target groups in a data base until the end of Phase 2 of the project | Work in progress | Platone contacts are composed of several data sets, i.a. the following:<br><br>- mailing lists of the consortium partners like E.DSO, B.A.U.M. (> 400) and RWTH (>1000),<br>- E.DSO members (43)<br>- contacts in the context of the series of co-creation events on user interaction (> 100),<br>- subscribers via Platone website (> 35),<br>- members of the LinkedIn group (> 85),<br>- participants of own events (up to 300),<br>- ADB members (18),<br>- several cooperation projects and partners.<br><br>Activities to constantly increase the number of contacts with the main stakeholders and target groups are implemented, e.g., in the context of trade fairs, events & meetings or the cross-project flexibility community. |

| | | A subscription form is active at the project website. |
|---|---|---|
| Further impact on creating awareness for Platone project and results | | With an article in the Forbes Magazine Feb 25, 2021: Want To Avoid Another Texas Debacle? Here Is How To Create A Clean, Resilient Electrical Grid." Interviewing Prof. Monti et.al. on the role of new automation architectures such as illustrated in Platone the project got international visibility. Contribution to CINEA brochure highlighting examples of innovative projects in the area Smart Grids and Storage by the EU, planned to be published end of November 2021. |

### 4.1.2  Dissemination Activities towards the Research Communities

**Dissemination activities towards the Research Communities**

To implement a bidirectional communication process to share knowledge and quickly identify and adopt new needs and opportunities for the Platone enabled solutions.

| Objective | Status | Summary of achievements |
|---|---|---|
| 1 developed and organised virtual or physical professional course to enable energy sector professionals to update their knowledge with a course promoting the use of the concepts developed in the Platone project, as part of the RWTH Academy Programme for life-long learning. | Work in progress | Due to the COVID-19 pandemic a physical professional course is unlikely, a virtual course was planned for summer 2021 but it was cancelled because the virtual format would not fit with the educational target. It will be rescheduled for next year. The German Association for Electrical, Electronic & Information Technologies (VDE), the Fraunhofer Society for the Advancement of Applied Research and RWTH are jointly looking to how bring Platone topics to the education of engineers in Germany. VDE wants to develop a new initiative about digitalisation, platforms, especially data platforms for utilities. VDE, Fraunhofer and RWTH will develop a coordinated offer. A first offer will be made in 2022 with a course on Cyber Security, promoted via VDE prob. 1-2 more offers are expected until the end of the project. |
| 4 published articles in highly ranked, prestigious, international peer-reviewed journals and magazines | Work in progress | P. Pediaditis et al.: Bilevel Optimization Model for the Design of Distribution Use-of-System Tariffs, IEEE Access (Volume: 9), 22 September 2021. 2 further articles have been submitted but not yet approved (Interoperability of platforms / Role of open source in the energy sector). |

| | | A set of Ph.D. theses with a focus on Platone concepts and solutions is expected at RWTH. |
|---|---|---|
| 10 contributions in international peer-reviewed scientific conferences | Work in progress | ePoster for CIRED BERLIN 2020 workshop, title "Innovative solutions to enable flexibility and retail markets in distribution grids: The Platone approach"<br><br>ePoster for CIRED online 2021, title "Platone: Towards a new open DSO platform for digital smart grid services and operation"<br><br>Due to COVID-19 there have been significantly less paper opportunities.<br><br>Further contributions are expected. |
| 1 designed and implemented informative special session e. g. in the IEEE PES series of webinars | Completed | IEEE International Conference on Communications, Control, and Computing Technologies for Smart Grids, 25–28.10.2021, hybrid in Aachen, Germany. Game Changer Roundtable "Open Source for energy", organized by RWTH, presentation by Areti and ENG, moderation by RWTH.<br><br>Platone was presented at the following IEEE events:<br><br>2021 IEEE International Forum on Smart Grids for Smart Cities, 17.-23.03.2021, online, Presentations by Avacon & EDSO; virtual Platone booth.<br><br>IEEE Canada Power and Energy Conference 2020, 09-10.11.2020, online, Presentation by RWTH (Keynote).<br><br>20TH IEEE Mediterranean Electrotechnical Conference - IEEE MELECON 2020, 16.-18.06.2020, Palermo, Italy, Presentation by ENG. |
| 2 summer schools at RWTH, where Platone topics are introduced | Work in progress | Summer schools will be organised in summer 2022 and 2023. |
| 1 course created and successful implemented in the university curriculum (Contribution in developing course content) to foster a new generation of modern power engineers | Work in progress | RWTH implemented a new laboratory class on Grid Automation based on the application of typical international standards such as IEC61850 and coordinated also with the architecture of Platone.<br><br>RWTH developed a new module on Digitalization for the group course "Future Energy Network"<br><br>RWTH is also developing a completely new Master level course on Digital Energy that will use significant input from the experience of Platone. The master course will probably start for the first time in 2023. |

| Further impact of relevance towards the research communities | | Contributions to OPEN DEI activities and working groups. <br><br> OPEN DEI Energy Pilots Explorer, contains an overview of the demonstration sites in the Platone, InterConnect and Interrace projects, published July 2021. |
|---|---|---|

### 4.1.3 Attracting and Supporting Grid Operators

| **Attracting and supporting grid operators** | | |
|---|---|---|
| To implement a bidirectional communication process to share knowledge and quickly identify and adopt new needs and opportunities for the Platone enabled solutions. | | |
| **Objective** | **Status** | **Summary of achievements** |
| 2 successfully organised events with a total of 75 participants, that invite DSOs to the Lab at the RWTH (or virtual) | Work in progress | A virtual first event to introduce the Platone Open Framework midst of 2022, second event combined with final conference. |
| 1 created and successful implemented informative course with a total of 30 participants to enable Energy Sector professionals to update their knowledge | Completed | At the Energy Delta Institute of Nyenrode Business School, Netherlands, Platone findings were also presented in 2020 and has been again presented in 2021 and is planned for 2022 |
| 5 documented updates on the progress of the project using the mailing list of E.DSO and to national associations in the energy industry | Work in progress | E.DSO members received three written updates on the progress of the project. |
| 15 ambassadors in an established "ambassador system" who share information of the project with their business networks | Work in progress | A Platone Advisory and Dissemination Board was successfully established. Total amount of members: 18. A first meeting took place in 2020, the second meeting in March 2020. Feedback processes have been implemented. <br><br> ADB members joined Platone events like the Platone midterm conference. <br><br> The ambassador system will be maintained and further expanded. |
| ≥ 2 early preliminary feedbacks by the DSO community on preliminary project results by discussing early recommendations with a panel of experts and gather indications about topics that | Pending | Feedback will be sought as soon as there are preliminary results in the project that can be discussed. <br><br> E.DSO quarterly Projects Committee meeting, 18.09.2020, online, Presentation by EDSO <br><br> Representatives of the DSO community have been invited to the Platone midterm conference |

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| shall be further investigated in project activities via DSOs community driven by E.DSO and its 39 Members (connecting 70% of the DSO customers in Europe), in cooperation with the 3 other DSO associations at EU level CEDEC, Eurelectric and GEODE | | and its breakout sessions as speakers/panellists as well as participants (above 300 participants joined the midterm conference). |
| ≥ 2 early preliminary feedbacks by the TSO community on preliminary project results by discussing early recommendations with a panel of experts and gather indications about topics that shall be further investigated in project activities via cooperation with ENTSO-E | Pending | Feedback will be sought as soon as there are preliminary results in the project that can be discussed. <br><br> Representatives of the TSO community have been invited to the Platone midterm conference and it´s breakout sessions as speakers/panellists as well as participants (above 300 participants joined the midterm conference). |
| ≥ 2 early preliminary feedbacks by Manufacturers, Academy and research centres (universities, EERA Joint Programme on Smart Grids) on preliminary project results by discussing early recommendations with a panel of experts and gather indications about topics that shall be further investigated in project activities via cooperation, e.g. organization of side events during the periodical meetings of associations like T&D Europe and EASE. | Work in progress | At the first Platone ADB meeting, feedback from representatives of EERA JP Smart Grids, EPRI, T&D Europe, AIT, Comillas, and CIGRE on Platone architecture was received. Trial site kick-off workshops with potential customers (private, commercial) and other relevant stakeholder groups likewise delivered first feedback. Further feedback will be sought as soon as there are preliminary results in the project that can be discussed. <br><br> Being involved via the SOGNO project in LFE already resulted in getting more interest by industry as well as research community. |
| Further impact of relevance on attracting and supporting grid operators | | Candidature for the 1st E.DSO Digital Power Award 2021 with the Platone DSO Technical Platform, September 2021. |

### 4.1.4 Fostering business innovation

| **Fostering business innovation** | | |
|---|---|---|
| To foster the adoption of Platone solutions and trigger further innovation processes and the development of a broad set of technical and business applications based on our results. | | |
| **Objective** | **Status** | **Summary of achievements** |

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| 3 documented joint activities with business-oriented institutions on European level, e. g. contributions to international business-oriented workshops such as those organized by Smart Grid Forum or with the European Institute of Innovation and Technology (EIT) to reach out to Start-ups and innovative SMEs | Work in progress | Joint webinar with Ericsson "How can 4G and 5G support the transformation of energy systems", 11.11. 2021, online, presentation by RWTH.<br><br>Malaysia Distinguished Lecture Series #105 - Professor Antonello Monti, Faculty of Engineering Universiti Teknologi (UTM Engineering, industrial solution partner), 11.01.2021, online, presenting i.a. the Platone architecture in the light of Open Source and dual use as key ingredient of an open platform.<br><br>NextGen SCADA Global 2021, 24.-25-03.2021, online, presentation by RWTH.<br><br>Further contributions will be made. |
| 5 productive and documented focus meetings with specialized industry initiatives with energy focus | Work in progress | Focus meetings took place with different representatives of the energy industry, e.g. with Vattenfall (RWTH).<br><br>Further contributions will be made, also in the context of the FlexCommunity. |
| 5 published high-quality professional articles in industry-related special interest journals | Pending | Professional articles in industry-related journals will be enhanced due to a more advanced state of the Platone project when rather concrete project results are available. |
| 2 successful organised virtual or physical exhibition stands in industry innovation events | Work in progress | Virtual booth at the 2021 IEEE International Forum on Smart Grids for Smart Cities, 17.-23.03.2021.<br><br>Virtual booth at the 2021 EU Sustainability Week (EUSEW), 25.-29-10.2021.<br><br>Physical and virtual booth at Enlit Europe, 30.11.-3.12. Milan, Italy.<br><br>Events will be further enhanced due to a more advanced state of the Platone project when rather concrete project results are available. |
| 1 Business plan for each of the finally defined Platone results | Pending | |
| 10 DSOs expressing interest in using our Platone platform | Work in progress | The ADB delivers a common ground for the adoption of Platone solutions. 4 DSOs were attending the 1st ADB-meeting, increasing the likelihood to express interest in using Platone platform at the end of the project. |
| 10 companies interested in the services, expressed as coming to a Platone event | Work in progress | With the dissemination activities like events, focus meetings and stakeholder engagement several companies have been addressed. E.g., above 300 participants joined the Platone midterm conference on 14 +15.09.2021, visitors joined our virtual booths at 2021 IEEE. |

| | | International Forum on Smart Grids for Smart Cities or EUSEW 2021 or Enlit Europe 2021.

Further interest is expected as soon as the Platone platform is released. |
| 4 instances deployed of Platone results (uptake of Platone by service providers) | Pending | The ADB delivers a common ground for the adoption of Platone solutions. Representatives from TSO, industry but also regulation and governance, were attending the 1st ADB-meeting, increasing the likelihood to express interest in using Platone platform at the end of the project. |

### 4.1.5 Introducing Platone Platform and Solutions in Standards

| **Introducing Platone platform and solutions in standards** | | |
|---|---|---|
| To ensure that project results feed into standardisation processes for global visibility. | | |
| **Objective** | **Status** | **Summary of achievements** |
| ≥ 2 early preliminary feedbacks by standardization bodies (IEC, CEN, CENELEC) on preliminary project results by discussing early recommendations with a panel of experts and gather indications about topics that shall be further investigated in project activities. | Pending | The focus on standardization bodies is planned for the 2nd Advisory and Dissemination Board Meeting. Activities to further gather feedbacks by standardization bodies will be enhanced due to a more advanced state of the Platone project when rather concrete project results are available |
| ≥ 3 successful and documented contributions to standardisation bodies, groups or committees e. g. of the IEC, CEN, CENELEC, IEEE, ETP Smart Grid Working Group on Utility Digitalization and the Conseil International des Grands Réseaux Electriques / International Council on Large Electric Systems CIGRE (via active roles of consortium partners) | Work in progress | The SOGNO platform been accepted in the international Linux Foundation Energy (LFE). Platone uses the SOGNO architecture as reference and expands the work of SOGNO with the integration of the market aspects and with the customer connection based on blockchain technology. The integration of SOGNO into LFE enables Platone to further exploit the possible growth of SOGNO and the corresponding new services.

Further contributions to standardisation bodies, groups or committees will be enhanced due to a more advanced state of the Platone project when rather concrete project results are available. |

### 4.1.7 Contribution to Policies and Governance

**Contribution to policies and governance**

To define and establish a comprehensive exploitation strategy (ES) that defines the management and promotion of the exploitation of project results during the project lifetime and beyond

| Objective | Status | Summary of achievements |
|---|---|---|
| ≥ 2 inputs (e.g., presentation, publication) on Platone findings as soon as available to ETIP SNET (preferably at events and platforms of the ETIP SNET support structure: SPRING) and BRIDGE | Work in progress | Presentation of Platone at the ETIP SNET 11th Regional Workshop (online), 21.04.2021 by RWTH<br><br>Several members of the Platone consortium are active in ETIP SNET working groups and activities.<br><br>E.DSO is member of the governing board of ETIP SNET.<br><br>Prof. Monti has been appointed as leader of the Task Force 1 for the WG4. The mission is to provide feedback to the EC on the digitalization strategy and to accompany the further process.<br><br>Members of Platone project are active in WG1 and WG4. Within WG1, RSE is mostly active for the preparation on the report on sector integration. RWTH provided input in relation to the use of SGAM approach for multi energy systems. |
| ≥ 2 inputs on Platone findings via an established connection enabling input to all types of industry and R&D associations in Europe and worldwide (via E.DSO) | Work in progress | At the first ADB meeting industry and R&D associations like EERA JP Smart Grids, EPRI, T&D Europe, AIT, Comillas, ISGAN, and CIGRE were attending. |
| ≥ 2 inputs (e.g. presentation, publication) on Platone findings to programme managers and framework setters in almost every EU country through the ERA-Net Knowledge Community (via B.A.U.M. Consult) | Work in progress | The BRIDGE taskforce on Energy Communities liaises with a twin taskforce of Joint Programming Platform ERA-Net Smart Energy Systems (JPP SES). Surveys have been done with BRIDGE and JPP SES projects to collect examples of Energy Communities, identify the support needs to develop such structures and better understand the regulatory conditions and tariff specifics in EU countries.<br><br>Further contributions are expected. |
| Successfully placed recommendations to national regulatory bodies via their European agency and association (ACER, CEER). | Work in progress | Platone leads the BRIDGE Working Group action "HEMRM". Together with other EU projects, BRIDGE, system operator's associations, citizen energy communities, EU institutional bodies like the European Commission, Agency for the Cooperation of Energy Regulators (ACER) and Council of European Energy Regulators (CEER) a joint |

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| | | draft for a common understanding of electricity market model in cooperation was submitted in October 2020. In April 2021 the current edition of the "EU BRIDGE HEMRM View" was published, intended as a differential analysis with the actual official HEMRM. The final version of the "EU Bridge HEMRM Differential Analysis" was sent to the European Commission in November 2021 for their final approval. |
| 1 successful presentation of Platone findings and the demo results to the Eurelectric in order to inform the main European Utilities and DSOs about the development of robust flexibility mechanisms and the adoption of novelties such as blockchain technology, integrated CBA analysis and interoperability | Pending | |
| ≥ 2 early feedbacks by regulators on preliminary project results by discussing early recommendations with a panel of experts and gather indications about topics that shall be further investigated in project activities via cooperation with<br><br>• Working groups of the Council of European Energy Regulators (CEER)<br><br>• Florence forum (Florence school of regulation) for webinars and participation to Florence Forum | Pending | |

# 5  Conclusion

The current edition of the communication and dissemination plan gives the basis for the upcoming communication and dissemination activities and orientation on what to do to reach the communication objectives for the following project year and in respect to the current project phase.

With its communication and dissemination activities, Platone is already creating well-visible impact. During the first project phase the consortium has laid a stable foundation for communication, dissemination and exploitation activities in the Platone project. A solid project communication infrastructure was implemented (Platone website, social media activities etc.) and videos on the Platone demonstrations were published. Several collaboration and cooperation activities kicked-off. The best examples are the lead of BRIDGE action on HEMRM, the creation of a BRIDGE Use Case repository, the contribution to the OPEN DEI project on aligning reference architectures, open platforms and large-scale pilots in digitizing European industry and the initiation of a flexibility community with other H2020 flexibility projects, which creates synergies with H2020 sister projects and which kicked-off with a joint online event in November 2020. With the kick-off of Platone´s cooperation with Canada in November 2020 three important action points 'Customer engagement', 'Platform technology' and 'Comparison of regulatory schemes Canada/Europe' for future cooperation were already determined and will significantly contribute to the knowledge transfer. Platone established also a good cooperation with the other project funded in the same call and in particular with the projects EUniversal and Platoon: this cooperation materialises in technical workshop and in a cross-participation in the project´s advisory boards. With the first meeting of the Platone Advisory and Dissemination Board (ADB) the consortium got very valuable advice and recommendations to further be considered in the process of the project. An additional visibility in the international context was the acceptance of the SOGNO project within the Linux Foundation Energy (LFE), which is the key component of the DSO Technical Platform in Platone.

Platone was presented at several events. This has strongly enhanced the project´s dissemination and stakeholder activities and is a first and important step for exploitation activities. One of the highlights was the Platone midterm conference on 14 and 15 September 2021 and the official start of the Italian demonstration as part of the programme with over 300 participants. In autumn 2021 Platone participated the EU Sustainable Energy Week (EUSEW), where Platone contributed to the EUSEW Energy Talks under the title "Socrates or Plato – whom shall the future energy system follow?" and hosted a virtual booth at the EUSEW virtual Networking Village. With the Enlit Europe 2021 in Milan, where Platone is present with a project desk in the EU project zone on of the first big events will be held again partly physically after a long gap due to the COVID-19 pandemic.

The focus in project year three is to actively pursue all collaboration and cooperation activities, foster transferring knowledge and disseminating (interim) results of Platone to relevant stakeholders and later to target groups. Beyond that, ongoing work will be done to expand, align and update tools and channels for spreading information to the identified relevant stakeholders who have a high impact on the success of the project to reach the desired engagement with a shift from "taking notice" up to direct involvement and feedback processes, e.g. in trials/demos.

In addition, consortium members representing Platone at stakeholder-relevant events will also still play an important role in the upcoming project year

The success of the communication and dissemination activities for phase 3 is an essential precondition for activities that will focus on the trials and associated interim results, deepen the customer integration and doing first preparations for the exploitation of results.

The current plan will be updated regarding ongoing and further planned activities, and will be developed considering the progress of the project. The upcoming plan will take into account the analysis of success indicators, possible adjustments in the strategic approach and in the implementation of measures.

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# 7 List of References

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# 8  List of Abbreviations

| Abbreviation | Term |
|---|---|
| ADB | Advisory and Dissemination Board |
| ACER | Agency for the Cooperation of Energy Regulators |
| CBA | Cost-benefit analysis |
| CEDEC | European Federation of Local Energy Companies |
| CEER | Council of European Energy Regulators |
| CEN | European Committee for Standardization |
| CENELEC | European Committee for Electrotechnical Standardization |
| CIGRE | Conseil International des Grands Réseaux Electriques (International Council on Large Electric Systems) |
| COVID-19 | Corona virus disease 2019 |
| DEMI | Distributed Energy Management Initiative (Canada) |
| DSO | Distribution System Operator |
| EASE | European Association for Storage of Energy |
| EASME | Executive Agency for Small and Medium-sized Enterprises |
| EERA | European Energy Research Alliance |
| EIT | European Institute of Innovation and Technology |
| ENTSO-E | European Network of Transmission System Operators - Electricity |
| EPRI | Electric Power Research Institute |
| ERA-Net | European Research Area Network |
| ETIP SNET | European Technology and Innovation Platform Smart Networks for Energy Transition |
| ETP | European Technology Platform |
| EU | European Union |
| GEODE | GEODE - the Voice of Local Energy Distributors across Europe |
| GIS | Geographic Information System |
| H2020 | Horizon 2020 (Funding programme of the European Commission) |
| ICT | Information and communications technology |
| IEEE | Institute of Electrical and Electronics Engineers |
| IEC | International Electrotechnical Commission |
| JRC | Joint Research Centre |
| KICs | Knowledge and Innovation Communities |
| LEC | Local Energy Communities |
| OGEMA | Open Gateway Energy MAnagement |
| RDI | Research, Development and Innovation |
| R&D | Research & Development |

| RES | Renewable Energy Sources |
|---|---|
| SEO | Search Engine Optimization |
| SET-Plan | Strategic Energy Technology Plan |
| SME | Small and Mid-sized Enterprise |
| STEM disciplines | Science, technology, engineering, mathematics disciplines |
| T&D Europe | European association of the electricity transmission and distribution equipment and services industry |
| TSO | Transmission System Operator |
| URL | Uniform Resource Locator (web address) |
| WG | Working Group |

# Annex A

## A.1 Stakeholder-specific Communication Matrix - Template

| | | | |
|---|---|---|---|
| Key Stakeholder | | | |
| General Description | | | |
| Specific opportunities and challenges and desired outcome after the project | Desired outcome during and after the project:<br>▪<br>▪ | | |
| Communication targets | Phase 1 | Phase 2 | Phase 3 |
| | The stakeholders should …<br>▪ | | |
| | Desired activities of the stakeholders<br>▪ | (same as year 1 plus:)<br>▪ | same as year 1+2 plus:<br>▪ |
| Key message & Sub messages | Phase 1 | Phase 2 | Phase 3 |
| | Key message | Key message | Key message |
| Tools and Channels | Phase 1 | Phase 2 | Phase 3 |
| | ▪ | adding:<br>▪ | adding:<br>▪ |