



## Stakeholders' map

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### Deliverable 2.2 of the BeSMART project

Responsible partner: Center for Energy Efficiency  
EnEffect

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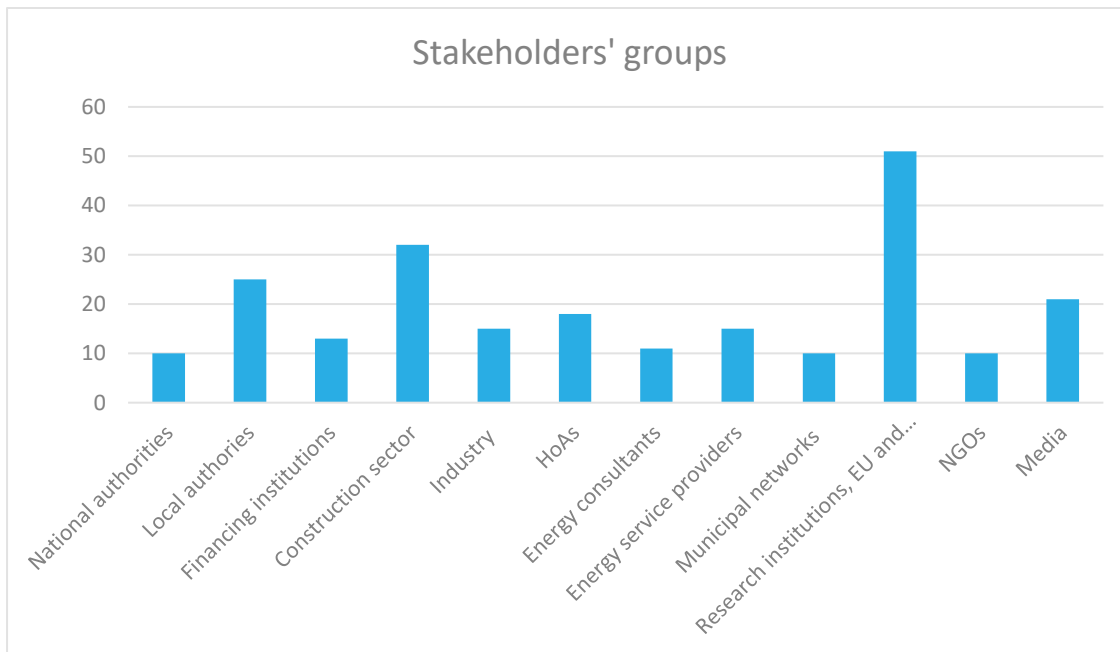
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## EXECUTIVE SUMMARY

The stakeholders mapping and analysis is an important step to identify the most appropriate and valuable stakeholders for the discussion forums, both in terms of their possible contribution to the dialogue, potential participation in events, and using the results and findings of BeSmart. The stakeholders’ mapping uses the methodology successfully applied in Bulgaria for different purposes by BUILDUPON, iBROAD and nZEB Roadshow projects, involving 4 main steps:

1) Identifying: the 12 stakeholders’ groups identified withing the project’s communication strategy were distributed among project’s partners in order to develop listings of relevant institutions and individuals, including websites and professional contact details. A total of 231 stakeholders were identified, few of them falling in more than one group due to their different functions and roles under specific circumstances. The quantitative representation among the stakeholders’ groups is demonstrated in the chart below.



2) Analysis: within this process, the identified stakeholders were categorized based on their expertise, value, commitment level and interest towards the development of the energy efficiency policies in Bulgaria; the evaluations were defined under a 3-step quality assurance mechanism.

3) Visualization: the stakeholder's relations to project's objectives and between each other were visualized on an interactive map using the specialized "Kumu" software. This procedure, providing visual maps of the connections and interdependencies between multiple criteria, enables us to understand where stakeholders stand among their peers when evaluated by the same criteria;

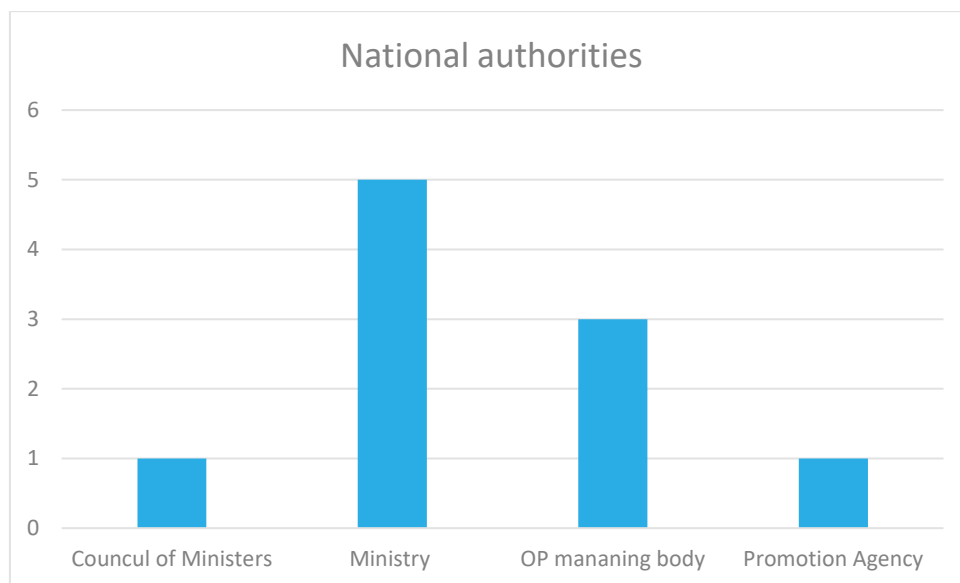
4) Prioritizing and setting engagement goals: ranking stakeholder relevance and attitudes has made possible to identified specific targets within each stakeholders' group and to channel efforts to engage each segment correctly and efficiently. The conclusions for each target group are available at the end of the respective chapter.

The analysis and the corresponding report are expected to serve for the optimal development of the next stages of the project, and most notably for the organisation and promotion of the roundtable events.

## I. NATIONAL AUTHORITIES

### Number of stakeholders per group

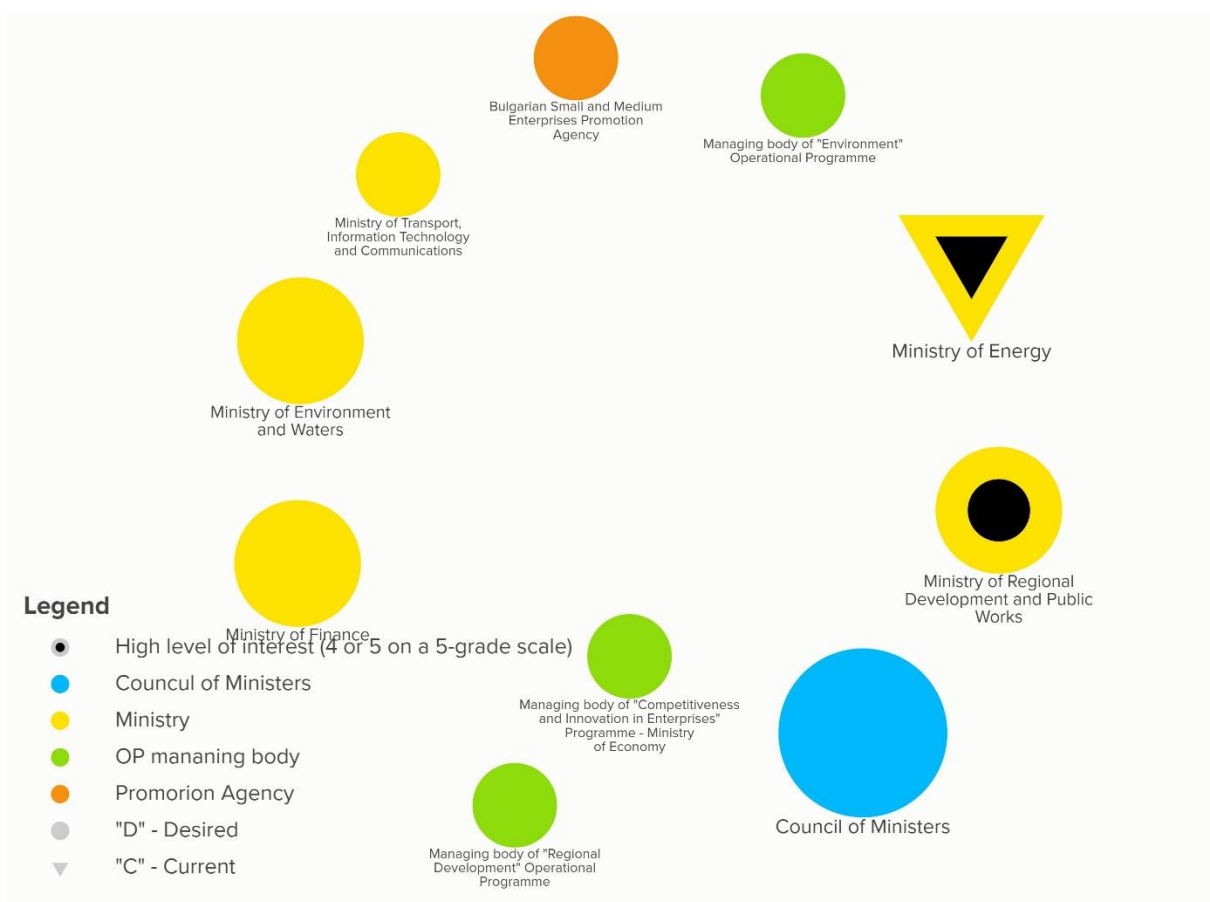
A total of 10 national authorities are identified as important for the projects' implementation, including the Council of Ministers, 5 ministries – the Ministry of Energy (MoE); The Ministry of Environment and Waters (MoEW); the Ministry of Finance (MoF); the Ministry of Regional Development and Public Works (MRDPW); and the Ministry of Transport, Information Technologies and Communications (MTITC), 3 managing bodies of EU operative programs – Competitiveness and Innovation in Enterprises; Environment; and Regional Development, as well as the Bulgarian Small and Medium Size Enterprises Promotion Agency (BSMEPA). The identified governing bodies are responsible for the implementation of the national energy and climate policies in different economy sectors like energy efficiency in non-residential building sector (MoE); energy efficiency in residential building sector (MRDPW); energy efficiency and climate policies in transport sector (MTITC); national climate policies (MoEW); and management of the public finances (MoF). The EU operative programs are the most attractive financial instrument so far for the final energy consumers in Bulgaria providing the highest grant financing. BSMEPA is the institution responsible for implementing and enforcing government policy for sustainable growth and competitiveness by the SMEs.



### Influence, interest and attitudes

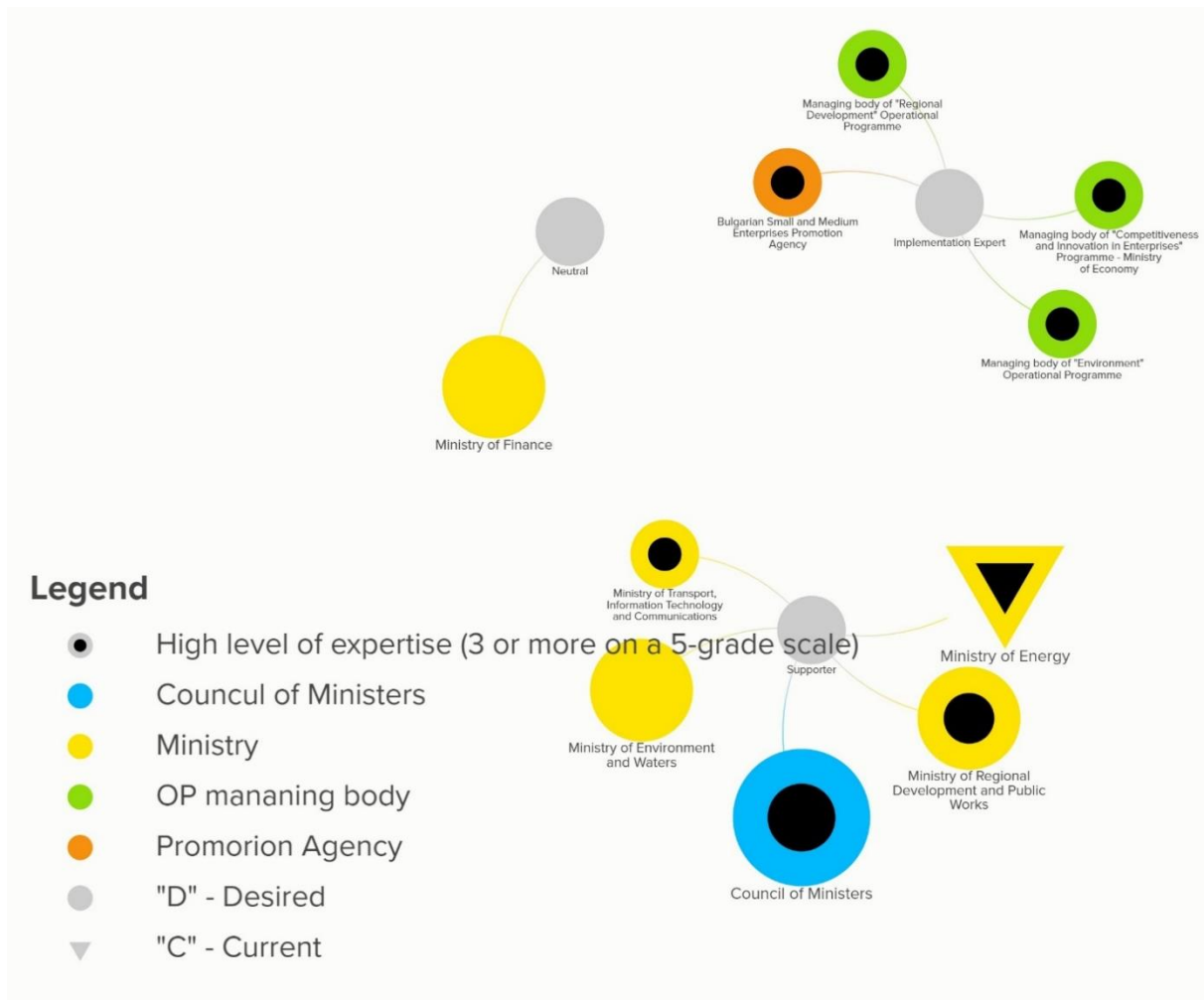
In terms of interest of involvement and influence the national authorities are very important as they are the bodies forming and governing the implementation of the national policies. It is very positive and encouraging for the project that almost all the stakeholders are supportive (circle shape) of it, as the Council of Ministers being on top of all governing bodies is logically the most influential (biggest circle). The MoE is the only one that do not have any expressed support to the project (rhomboid shape) but at the same time it is one of the two stakeholders, together with the MRDPW presenting highest level of interest to the project activates (black coloured centre of the shape). This is explained with the lower role which the ministry sees for it in the process of formulation of the financial instruments from one side but the clear

understanding that the financial instruments are of key importance for the success of the implementation of the policies under its governance.



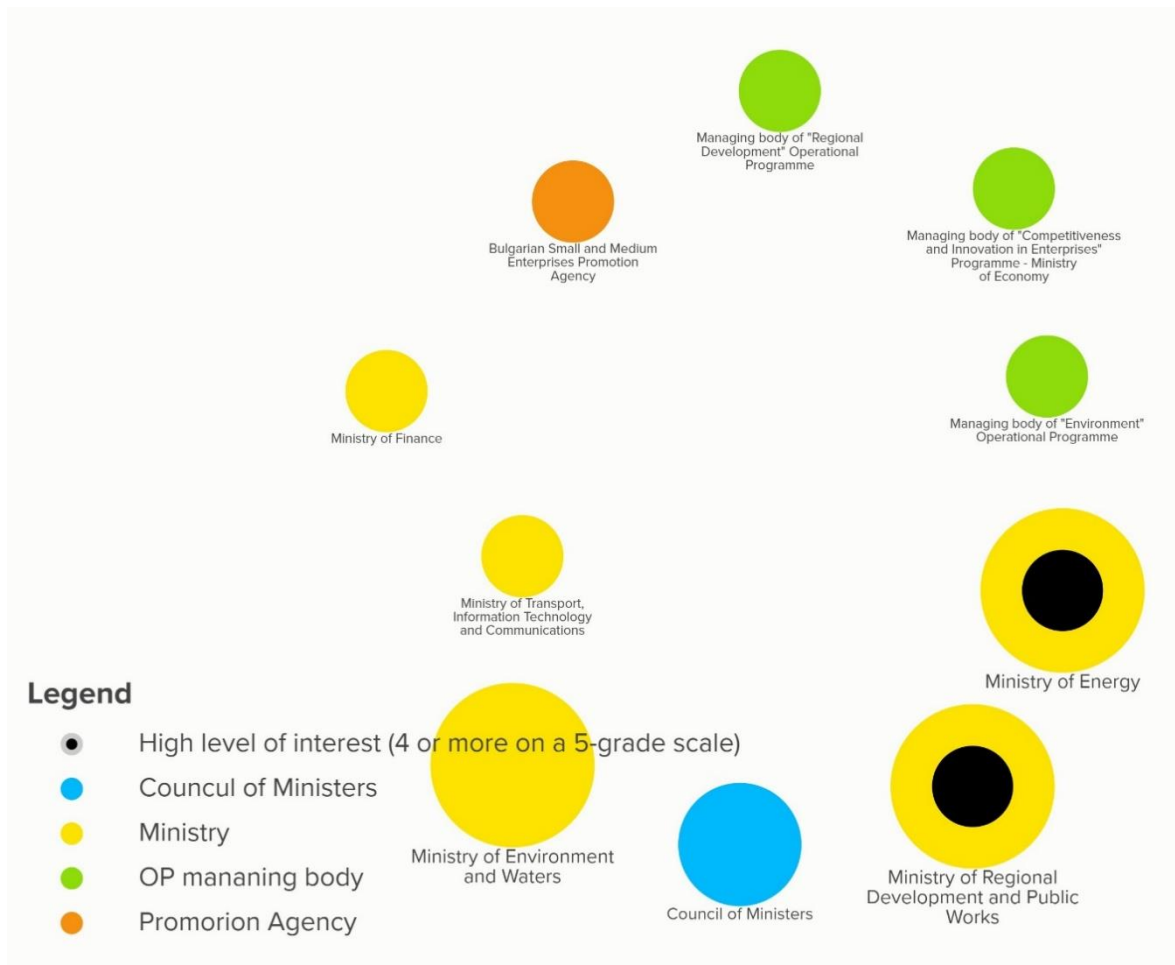
### Type of involvement – influence – expertise

In the engagement plan all stakeholders are divided in groups with specific targets and role of the participants involved. The analyses of involvement of the national authorities and their influence and expertise is visualised bellow. The EU operational program bodies and the Bulgarian SMEs promotion agency are classified as implementation experts. These authorities are already practically involved as partners or collaborators in different initiatives on similar to the project-related topics. The Council of Ministers and 4 of the involved ministries are identified as supporters as they are institutions with high level of influence having important role for attraction of interest to the organized events. Excluding the MoEW, all other stakeholders included in the supporters' group are considered to have high level of expertise in the field of energy efficiency and renewable energy. Having no specific expertise in this field, the MoF is considered as neutral.



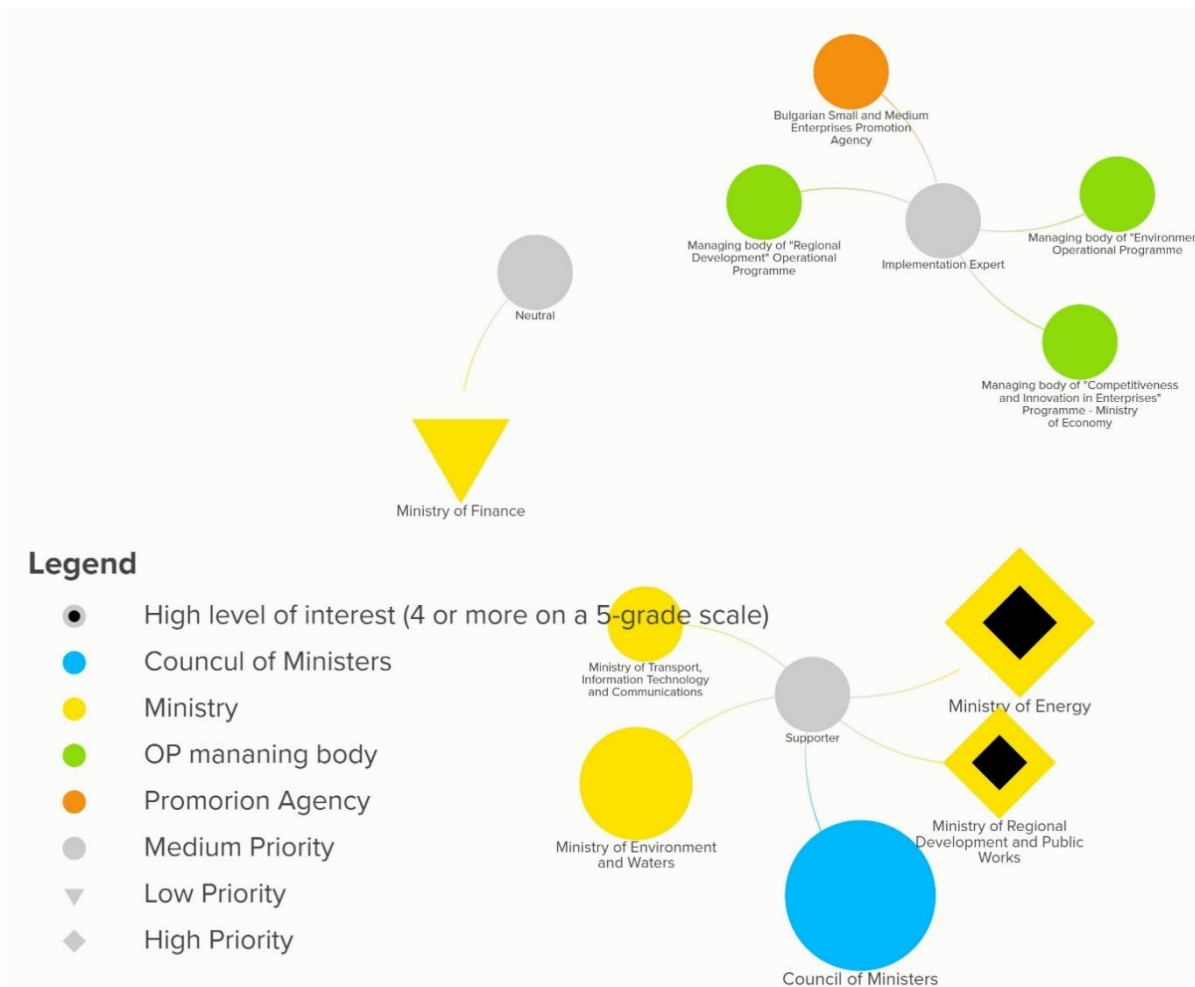
**Necessity of involvement, attitude and interest to engage**

The analysis of the necessity of involvement, attitude and interest to engage are presented on the chart below. Obviously, the highest necessity of involvement is considered for the ministries responsible for the implementation of the national energy and climate policies – MoE, MRDPW and MoEW (biggest size of the circle shape) but the involvement of all other national authorities in the radar is also important (all stakeholders viewed with circle shape). Fortunately, exactly the MoE and the MRDPW are also the most interested stakeholders (bullseye).



### Influence – priority – role – interest

The interest and value for the project of the specified groups of stakeholders is determined by an analysis of four indicators – influence; priority; role and interest. Again, the highest level of influence on a wider circle of stakeholders is considered to be for the national authorities included in the group of supporters. Among them the topics are of a high priority (black coloured centre of the shape) and interest (rhomboid shape) for the MoE and the MRDPW. Anyway, the majority of the other national authorities are considered to accept the topics at least as a medium priority (circular shape). For the MoF energy efficiency and renewable energy issues are identified as a low priority.



### Conclusion: specific actions needed for the stakeholders' groups

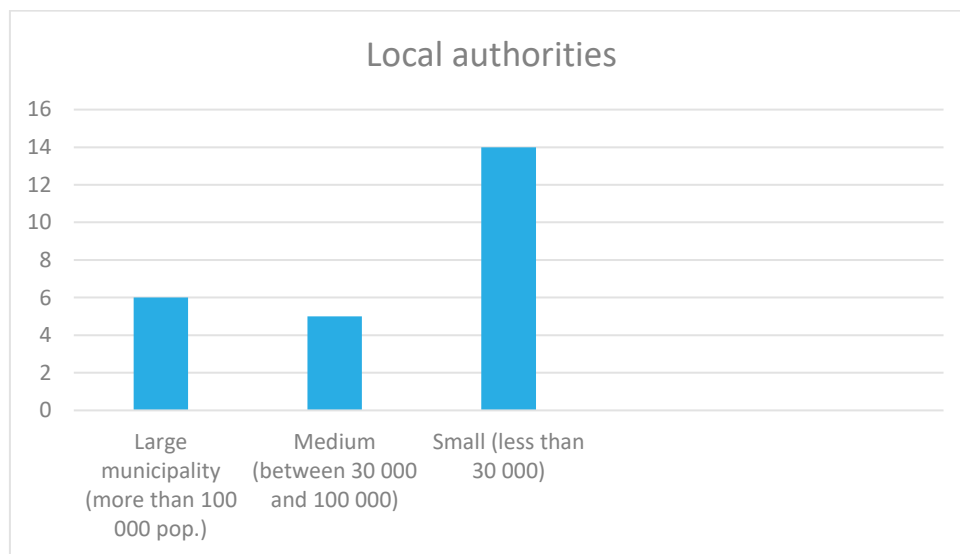
As a result of the analyzes, it can be concluded that the support and greater involvement of the Council of Ministers and the identified ministries is of particular importance for the successful development of the activities in the BeSMART project. For these institutions, the topics of energy efficiency and renewable energy are of particular interest and of high priority. As those responsible for the formulation and implementation of national policies, they have the greatest influence with their participation in strengthening the interest of the other stakeholders. However, the importance of the commitment to the activities of the other identified national authorities, which are the ones that work directly with the beneficiaries of the financial instruments and already have expertise in the research areas, should not be underestimated.



## II. LOCAL AUTHORITIES

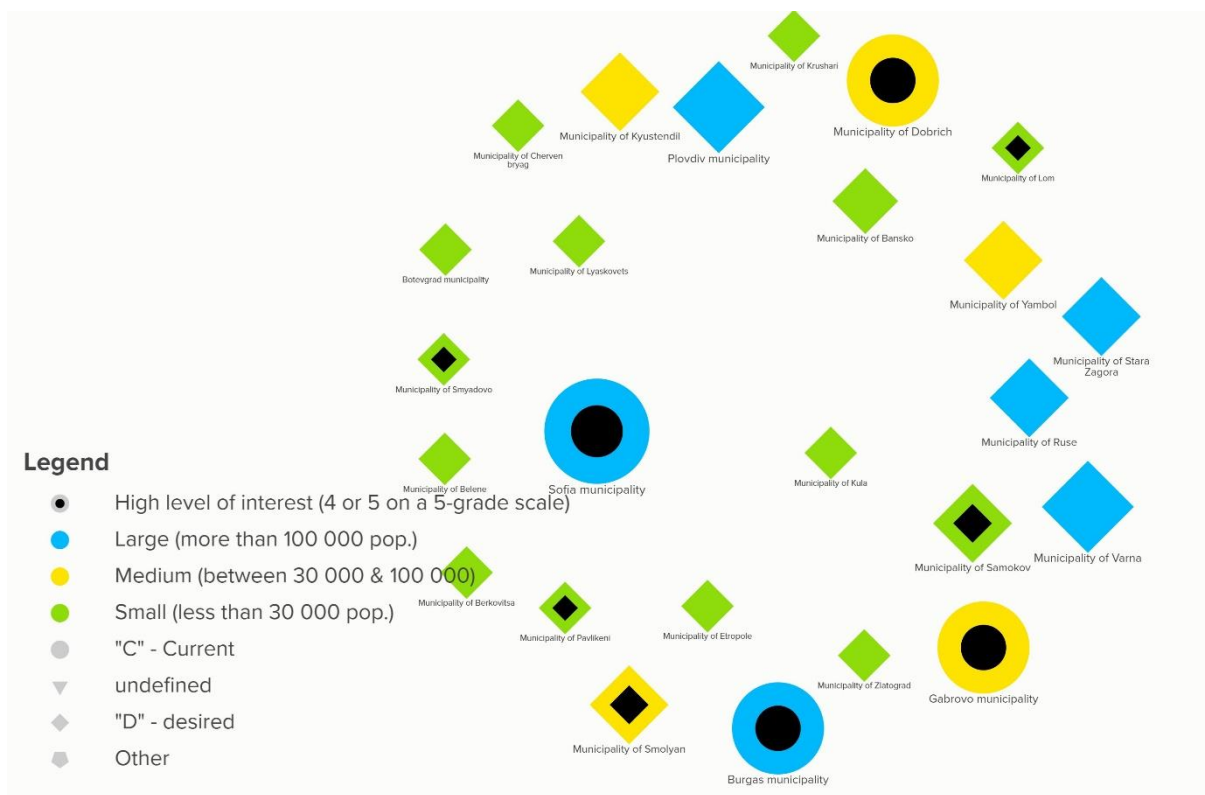
### Number of stakeholders per group

25 out of a total of 265 Bulgarian municipalities were identified and analysed as being active in the area of energy efficiency and renewable sources. The sample is considered representative, as it includes a sufficient number of small (14), medium (5) and large (6) municipalities. Local authorities should have exemplary role in energy efficiency financing, by developing the market and attracting private financing, as being responsible for: a) the renovation of the public building stock and the street lighting systems; b) management of the programs for renovation of residential building stock and c) influencing local business and industry. Several contact points were identified in each municipality as responsibilities and competences regarding the discussed topics are distributed in different departments.



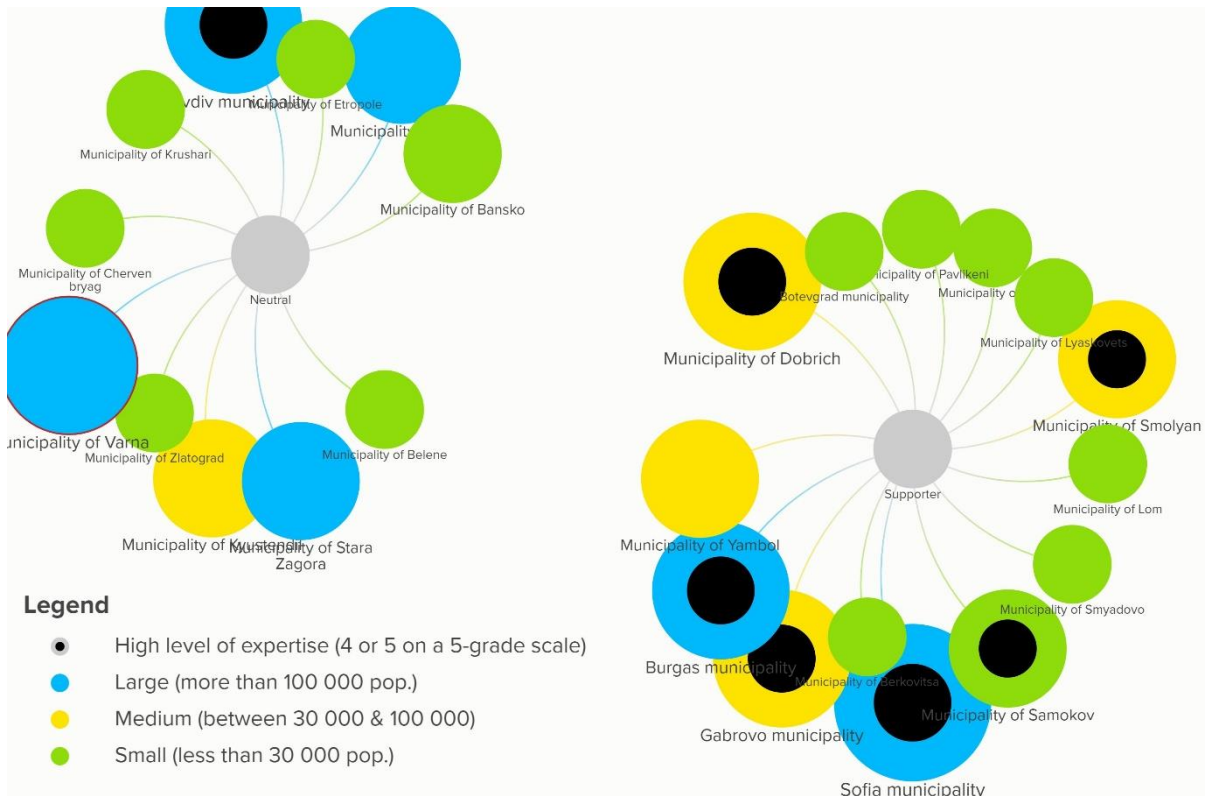
### Influence, interest and attitudes

The analysis in terms of importance of involvement and influence show that only some of the medium and large municipalities are supportive to project activities (circle shape). Although the results are logical, given the higher administrative capacity, in these municipalities, still less than half of them (4 out of 11) are relevant for the successful implementation, influencing other actors of the market and participants and supporters in the events. Considering the interest of the local authorities, similar ratio can be seen as only 9 of 25 municipalities are ready to follow the project and its results. As mentioned before, it is expected that the local authorities should have exemplary role in the process of financing energy efficiency projects, however, it is obvious that most of them have rather adapted to the existing grant driven market and do not have ambitions to change the status quo. Instead of being the driving force for improvement of national policies through the National Association of the Municipalities, that can have an important role in shaping up innovative financial instruments, they more or less vegetate around the grant funding provided under the Operational programs. There are, of course municipalities that recognize the need of scaling up the investments in energy efficiency, most of them being part of the Municipal Energy Efficiency Network EcoEnergy.



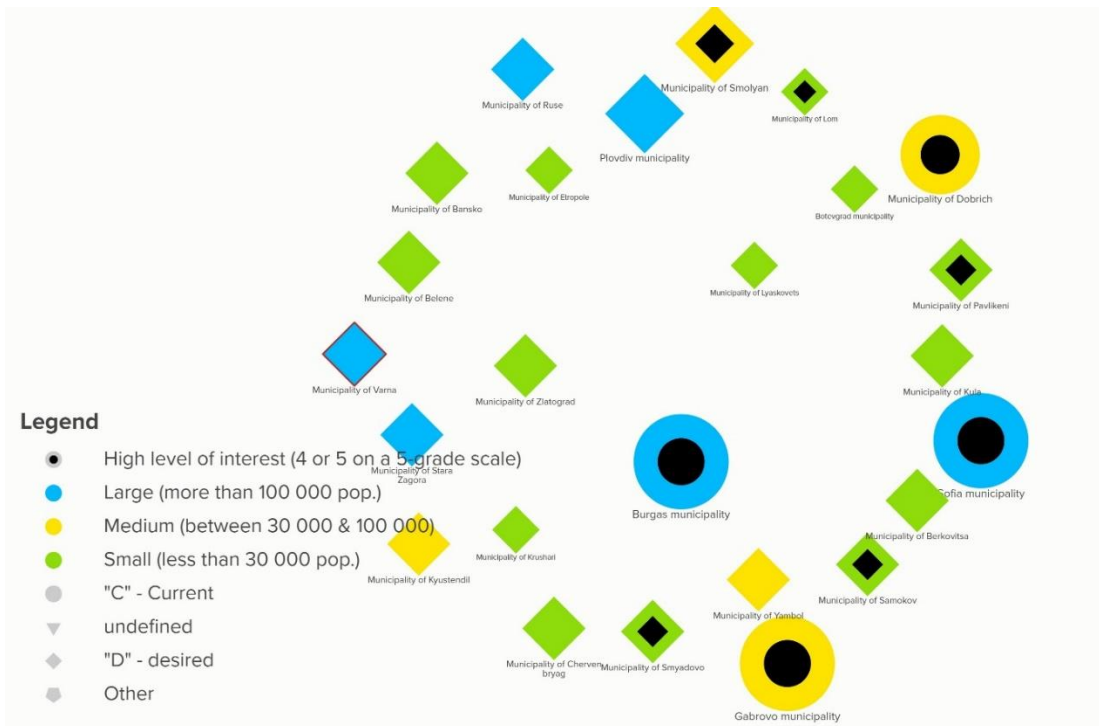
**Type of involvement – influence - expertise**

Only 7 out of 25 municipalities believe of having high level of expertise. As shown in the visualization bellow, 6 of these municipalities are actually the ones that support the project either as direct partners or being close collaborators in various initiatives. Another outcome from the analyses is also the influence of the municipality that according to many of them strongly depends on their size. However, small municipalities with high level of expertise also consider themselves as influencers. As it can be expected the small municipalities, that usually have limited resources and capacity or believe that their expertise on the topic is not sufficient.



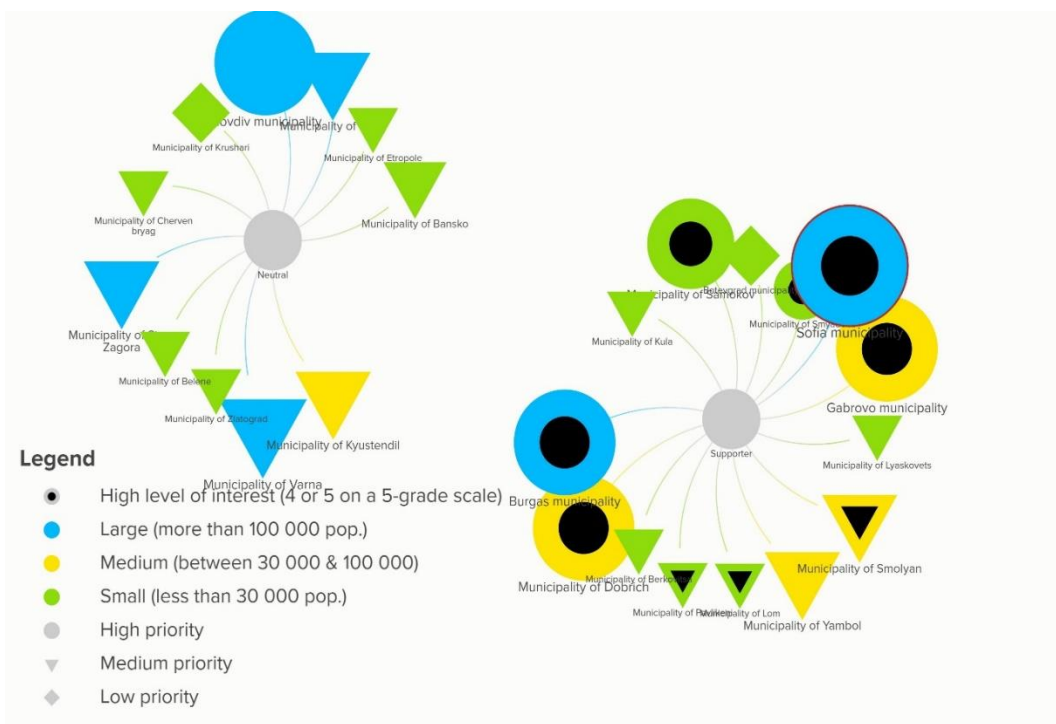
**Necessity of involvement, attitude and interest to engage**

The analysis of the necessity of involvement, attitude and interest to engage are presented in the chart below. As it may be expected the municipalities with high level of expertise (see above) are the ones who do not need additional tackling to be involved in the process. 9 out of 25 municipalities have high level of interest, most of them being members of the Municipal Energy Efficiency Network EcoEnergy. However, it is obvious that specific efforts should be targeted to involve a wider range of municipalities, those who are interested and those who still have no interest to engage.



**Influence – priority – role – interest**

This 4-variables approach reveals the priority for involvement of the different stakeholder sub-groups in relation to their interest and value for the project. In this regard, top priority should be given to the large municipalities, considered as the most powerful to influence the market shaping and the municipality with high level of interest who already collaborate. Although, with lower level of influence, small municipalities should also be targeted as 8 out of 14 recognize themselves as supporters.



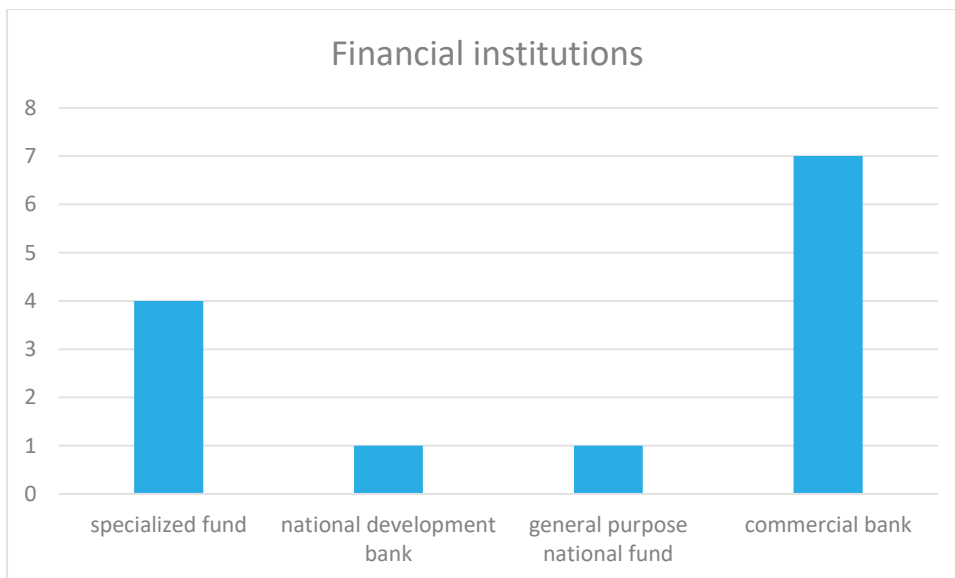
**Conclusion: specific actions needed for the stakeholders’ groups**

Based on the above analysis, it is clear that less than half of the identified municipalities, recognize themselves as market drivers, who have significant role in the policy-making process and will actively support the activities under BeSMART. It is recommendable to involve more municipalities in this process during the development of BeSMART activities. The results show that this involvement can happen through raising the level of expertise, as the local authorities who have the needed capacity are actually the ones supporting the project. Furthermore, large and medium municipalities consider having high level of influence, but without proper knowledge and expertise it is doubtful how they will use their influence for improving the much-needed reforms and the future financial mechanism that are expected to develop the energy efficiency market.

**III.FINANCIAL INSTITUTIONS**

**Number of stakeholders per group**

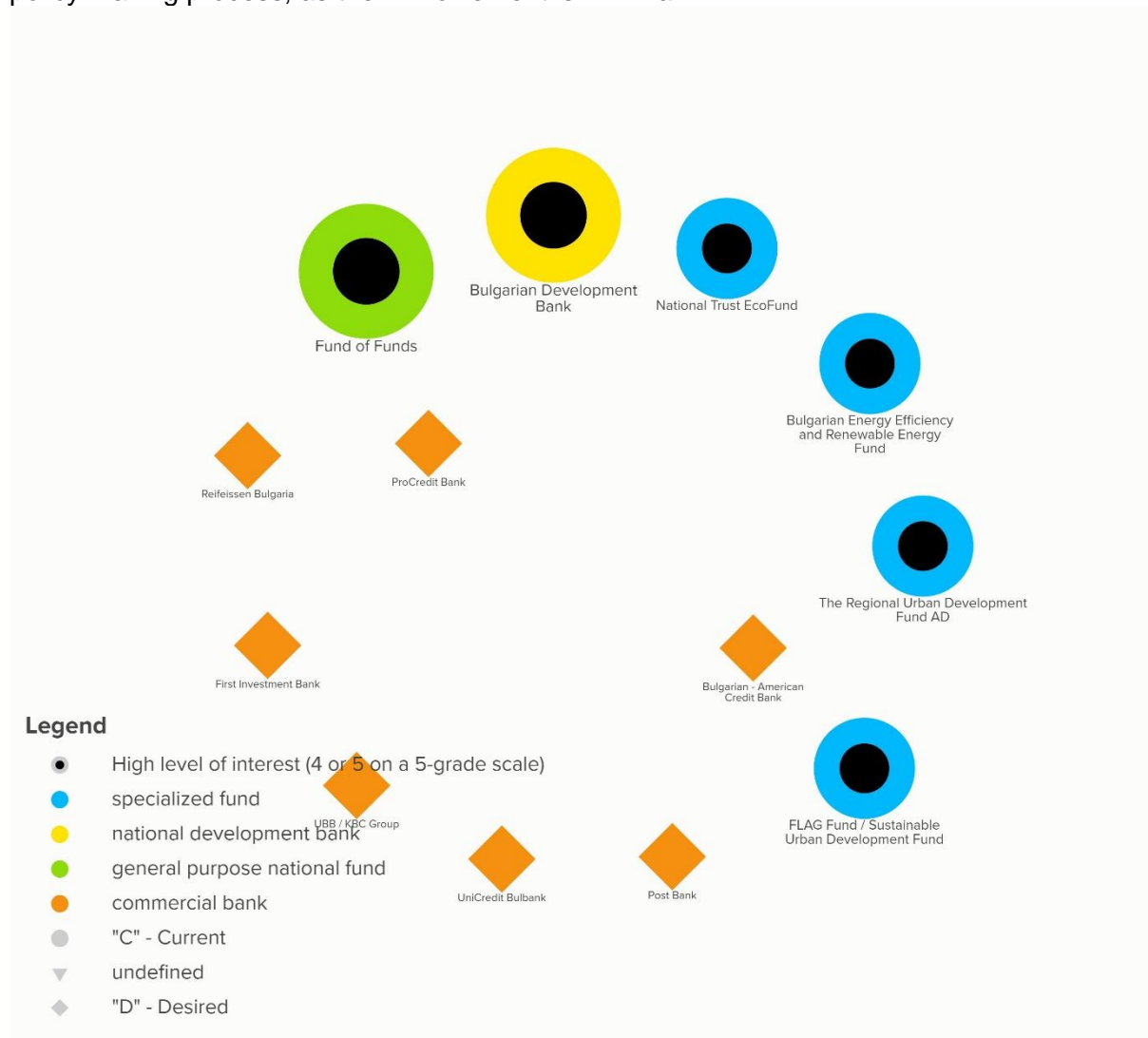
A total of 13 stakeholders are identified as important for the projects’ implementation, including 7 commercial banks with significant impact on the consumer market and/or proven interest in environmental policies and products, 4 specialized funds and 2 public financial facilities with the role to develop the market and provide resources for specialized funding lines involving the commercial banks. The consultants and ESCOs are analyzed in different groups of actors (7. Energy consultants, 8. Energy service providers). Several contact points are identified in each of the major banks and funds as usually the responsibilities and competences regarding the topics under discussion are covered by different units.



**Influence, interest and attitudes**

Given the nature of the activities of the project, it is no surprise that the analysis in terms of importance of involvement and influence shows that most of the stakeholders are considered as both being highly relevant for the successful implementation, having a strong influence over

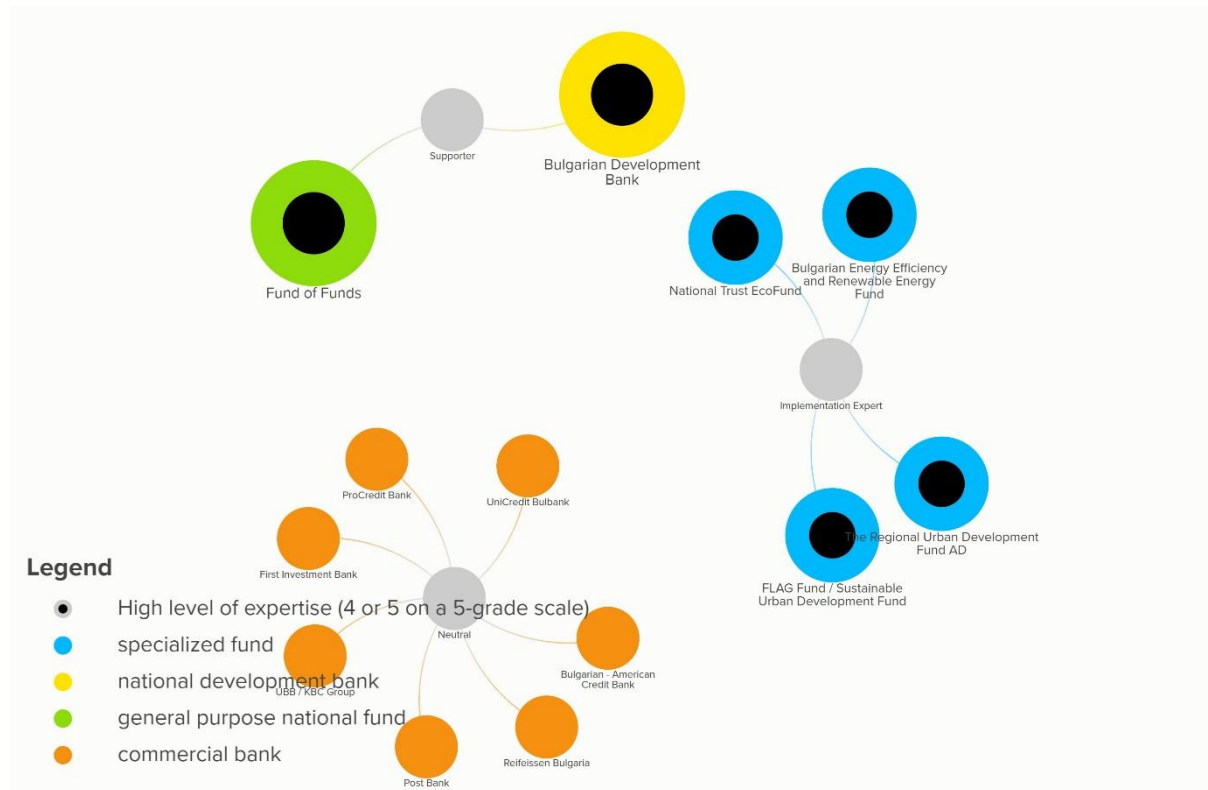
other actors on the market, and being able to attract other participants and supporters in the events. There is a clear and very positive sign that the national-level financial mechanisms (Fund of Funds and Bulgarian Development Bank), which are always attractive to other financing institutions due to their role in the financial system, are interested (bullseye) and supportive (circle shape) of the project. On the other side, it is also clear that the commercial banks, although obviously important to involve, are not considered interested and do not have any expressed attitude towards the proposed activities (rhomboid shape). This is explained with the lack of transparency and continuity in the policy making process in the subject area, which repels them from elaboration of consumer or business products related to specific subsidy schemes. Not surprisingly, they also do not appear to have a direct influence on the policy making process, as their involvement is minimal.



**Type of involvement – influence - expertise**

The analyses of each type of involvement provides important information about the desired role of each group and is key for defining the stakeholders’ groups which will be specifically targeted in the engagement plan. As described in the visualisation below, the specialized financing funds are referred to as implementation experts, and they are already practically involved in the activities either as direct partners or as close collaborators on various initiatives.

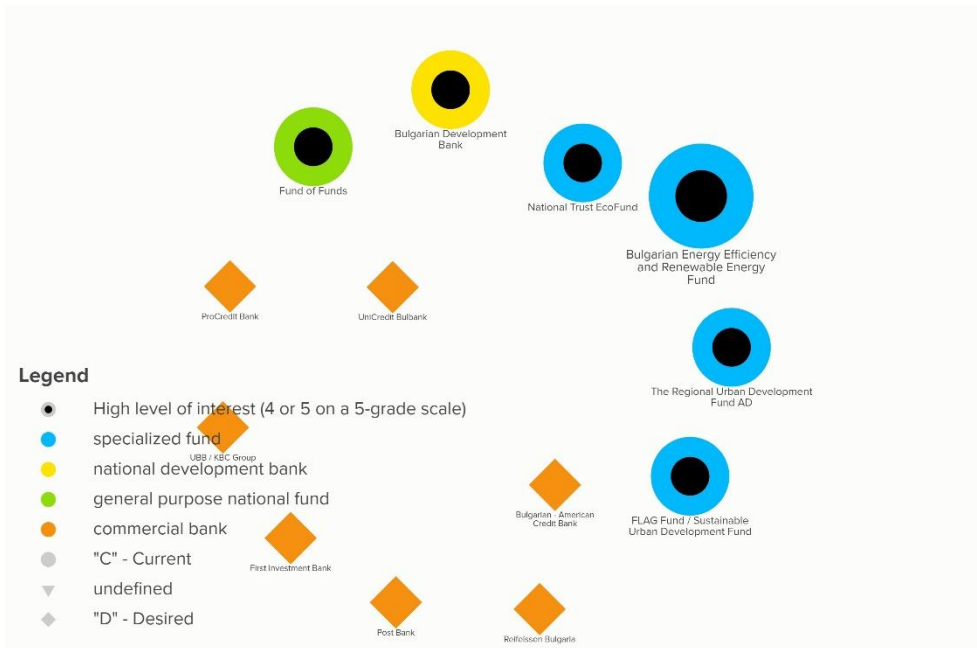
Additionally, the national-level financial mechanisms are identified as supporters, which is a good prerequisite for the organization of the events, also given the fact that they are all considered to have high level of expertise. Again, the most problematic segment appear to be the commercial banks, which are defined as neutral and lacking the necessary knowledge and understanding on energy efficiency and RES-related issues.



### Necessity of involvement, attitude and interest to engage

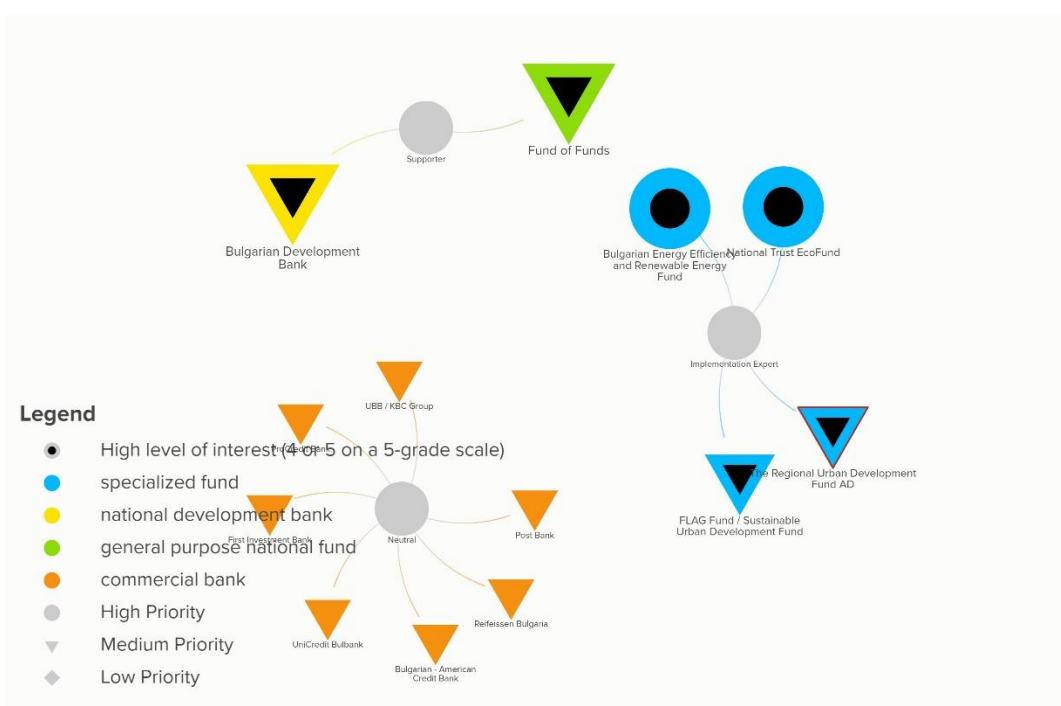
The analysis of the necessity of involvement, attitude and interest to engage is the most important one to identify the weak points and gaps in the developed stakeholders' map. Again, the situation for the financial institutions is quite clear, as while the national-level financing bodies and the specialized funds are considered to be irreplaceable at this stage of market development (and thankfully interested), it is obvious that specific efforts individual approaches should be targeted to involve the commercial banks. While it cannot be differentiated which commercial bank is more important to be involved than the other (hence the smaller size of the shape), the desired situation of them being supportive (transforming the shape from rhomboid to circle) is far from being achieved.





**Influence – priority – role – interest**

This 4-variables approach reveals the priority for involvement of the different stakeholder sub-groups in relation to their interest and value for the project. In this regard, again it can be stated that the prerequisite for successful implementation are high given the interest and motivation of the implementers and supporters to join – them being the market shapers. However, even though mutually interchangeable (hence the medium priority for each of them), the commercial banks remain the biggest challenge, as they are not considered interested to collaborate, especially given the political insecurity at national level.





**Conclusion: specific actions needed for the stakeholders’ groups**

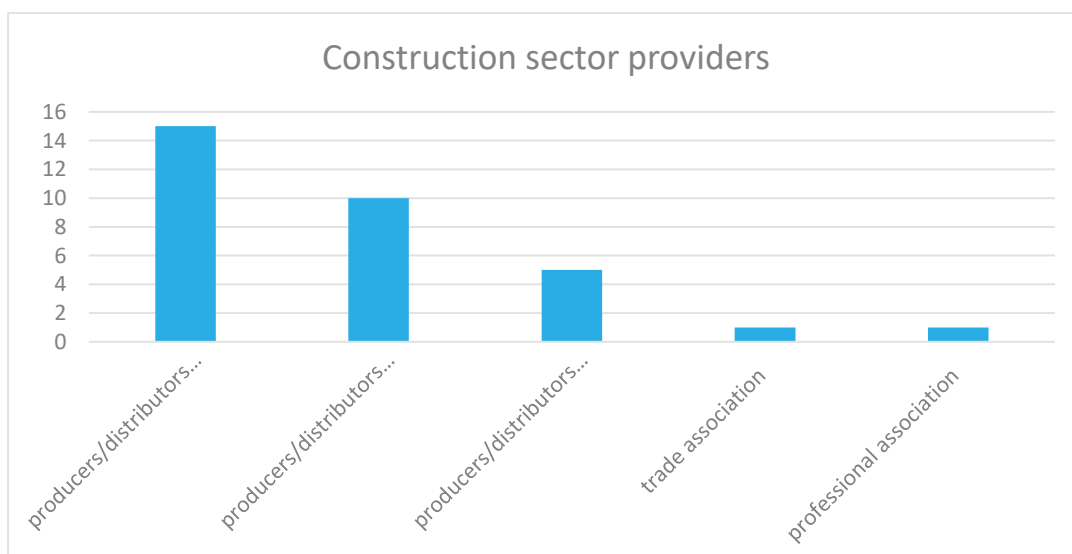
Based on the above analysis, it is clear that within the development of the BeSMART activities, the established connections with the general function public financial mechanisms and the specialized energy efficiency and renewable sources funds should be maintained. However, specific attention is needed for the segment of the commercial banks, which are generally unwilling to get involved in the policy-making process and base their activities on their individual evaluation of the potential and risks for the consumer market, with insecurity of the national policies seemingly being a major bottleneck (potentially combined with other generic barriers as small size of the projects, lack of market aggregators, insecurity for the financial flow and lack of risk-sharing mechanisms).

**IV.CONSTRUCTION SECTOR**

**Number of stakeholders per group**

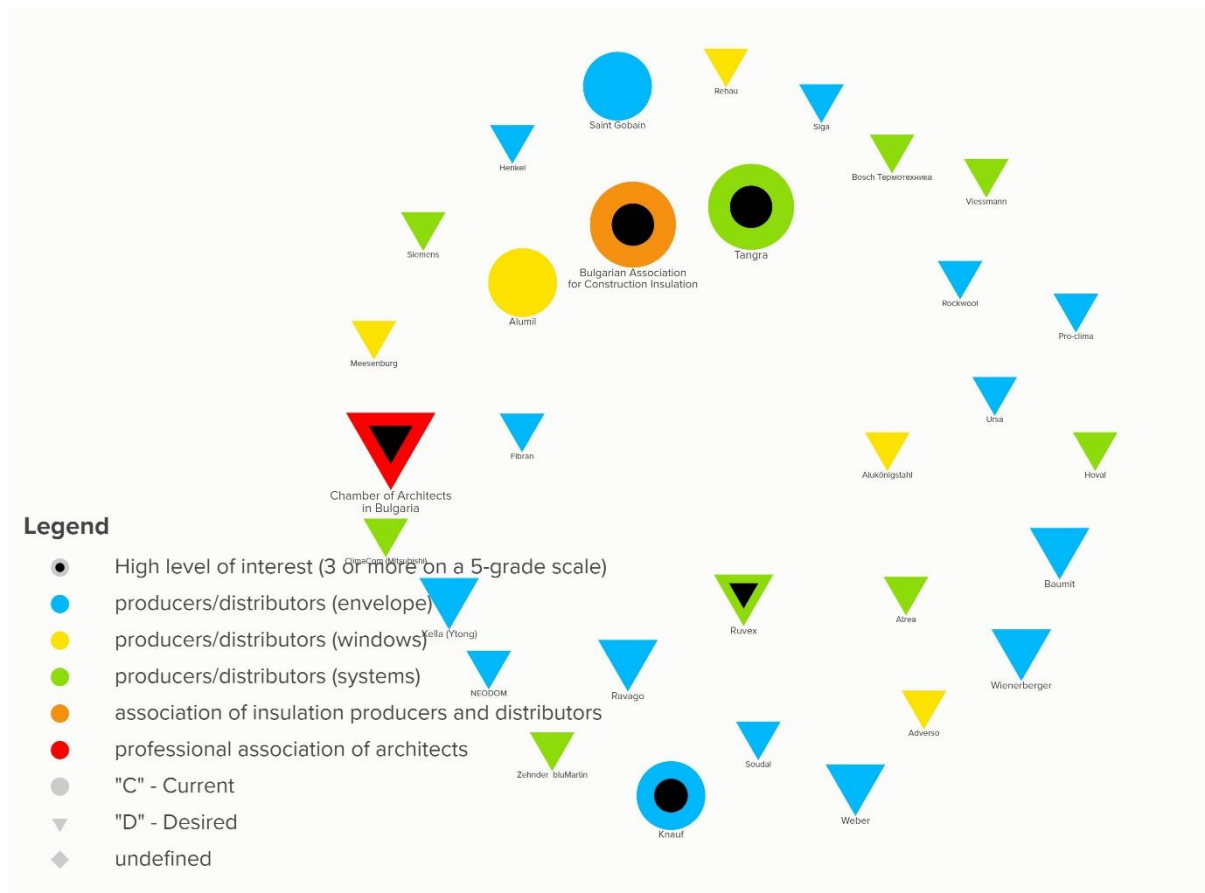
The total number of stakeholders from the construction industry identified as important for the implementation of the project is 32. Within this group, only producers and distributors of products, components and technologies suitable energy efficient construction are analyzed. The individual project developers are not considered as applicable in this group, because they are officially represented via the Bulgarian Construction Chamber (BCC, a direct partner in the BeSMART project), being obliged by law to be members of the chamber.

The analyzed stakeholders are selected on the basis of their previous involvement in related initiatives and registered interest in the policy-making process, as well as on the size and scope of their business. Additionally, distributors of large international brands are added, even though some of them have not been active in policy discussions so far. Among the selected stakeholders, there are 15 suppliers of non-transparent building envelope products, 10 suppliers of building systems, and 5 suppliers of windows and joinery. They are accompanied by 1 professional and 1 trade association which are considered as decisive for the sector.



### Influence, interest and attitudes

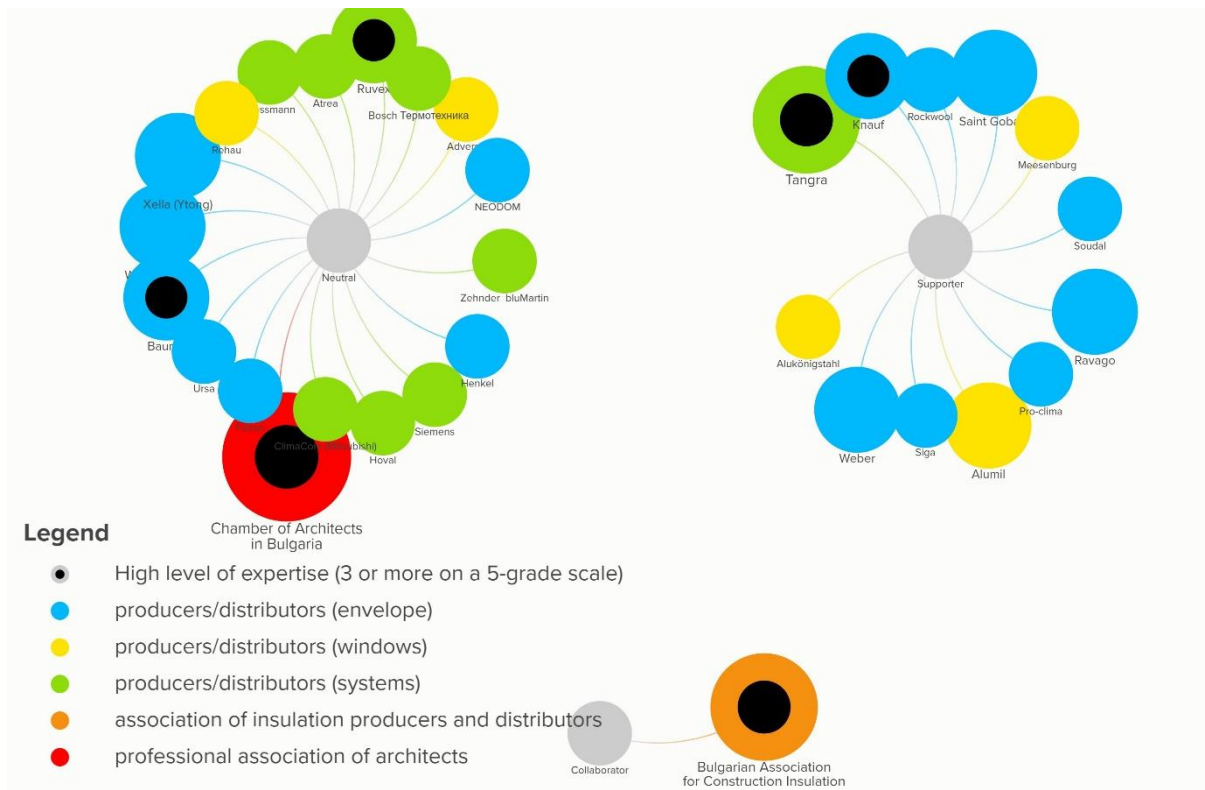
The analysis of the influence of the different actors shows a varied and somewhat inconsistent picture, consisting of leading organizations from each of the analyzed subgroups, but limited involvement and interest from the majority of the stakeholders. As it could be expected, the professional and the trade associations command higher level of influence and are sufficiently interested in the process. However, the Chamber of Architects is not considered as supportive at this stage, which provides a major challenge for the actions considering the built environment. On the other hand, the project activities have full support from the Association for Insulation in Construction, which is a strong advantage point. It is clear that there are opinion leaders also among the product manufacturers, one of them being a local producer (Tangra), and the other – a multinational company active on policy making issues in the entire region (Knauf). It is however clear that few of the manufacturers are equally interested, even though the mid-range evaluation mark of 3 on the 5-grade scale was included in the visualization. To a certain extent, this is due to the reason that many of high-end producers are objectively excluded from the process given the lowest price competition within the public procurement procedures typical for the market.



### Type of involvement – influence - expertise

This type of analysis is crucial to the planning of resources for attraction of the particular stakeholders' group, and it is to a certain extent reassuring that there is a sufficient number of stakeholders defined as supportive to the initiative. It is interesting to note that many of them however are specialized in building envelope measures (also very clear in the profile of the

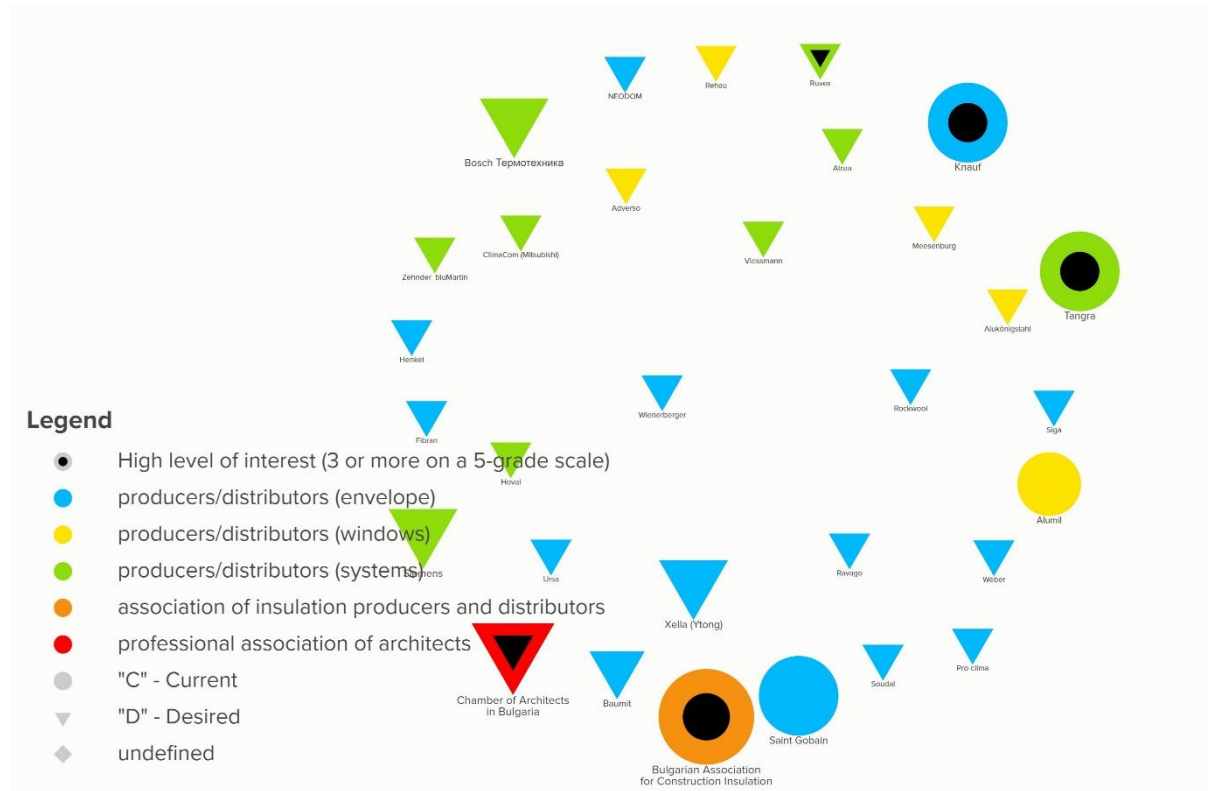
only collaborator in the group), which is understandable given the fact that the current renovation programme are predominantly financing exclusively such measures, while the building system are rarely a subject of a public policy intervention. In this regard, additional efforts must be targeted to attract that part of the group, as whole-building interventions and integration of different measures are likely to be the focus of the future renovation programmes. It has to be acknowledged that certain actors of influence and high level of expertise are not yet considered as supporters, rather being neutral to the policy dialogue in relation to the transformation of the financing mechanisms to more sustainable ones, which demonstrates the ambiguity of the problem at hand and the still existing expectation of continued 100% public support for the renovation action. Additionally, there are other division lines between different professional (and not only) associations, mostly in terms of administrative requirements towards the project documentation.



### Necessity of involvement, attitude and interest to engage

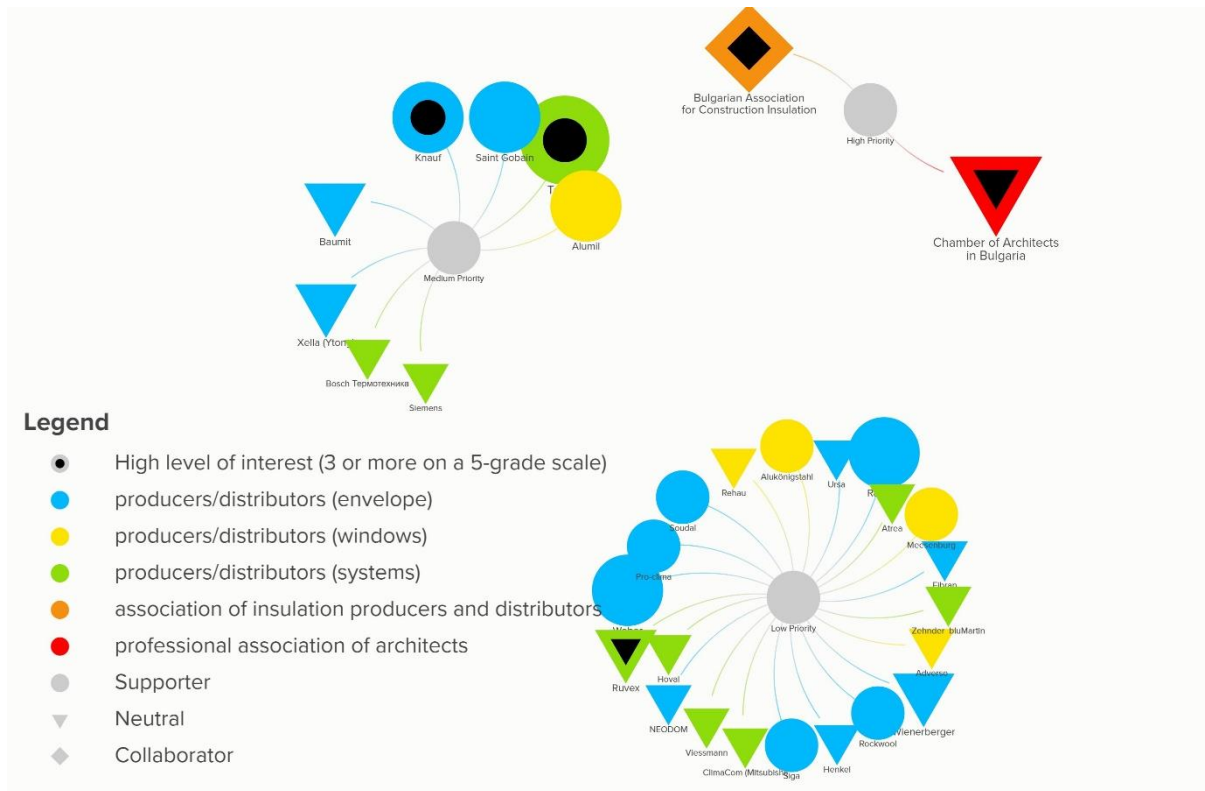
Again, the in-depth look towards the necessity on involvement indicates the need of a differentiated approach and individual attention to certain stakeholders. While it is a promising fact that some of the key and influential stakeholders that are necessary for the success of the action are supportive of its target, the majority of the smaller companies are still to reach this attitude, rather being uninterested in the proceedings at this stage – shown by both the attitude (the triangular shape) and the presumed level of interest (lack of bullseye, meaning evaluation of 2 or less on a 5-grade scale) . Some of these actors are defined as comparatively important for the organization of the roundtables and the development of the policy-making process, as besides the Chamber of Architects, that

applies to specific national and international companies providing either top-level technologies or having their production base in Bulgaria, which makes them important for the local policy makers.



**Influence – priority – role – interest**

As it could be inferred by the above analysis, the professional association of architects and the trade association of producers of insulation materials are considered as highest priority for the engagement action; the starting point however is rather different, meaning that more targeted efforts should be applied to the Chamber of Architects. Medium priority is given again to influential local companies, international companies with production in Bulgaria or providers of innovative technologies, while most of the individual suppliers are considered interchangeable and will be targeted collectively. However, this list is dynamic and the situation is continuously changing through either the direction of the national support mechanisms or the individual companies’ policies (and even by personal involvement of individual actors – key figures in the sector) and the situation will be monitored carefully to identify appearing interest, especially from the companies with higher level of influence.



**Conclusion: specific actions needed for the stakeholders’ groups**

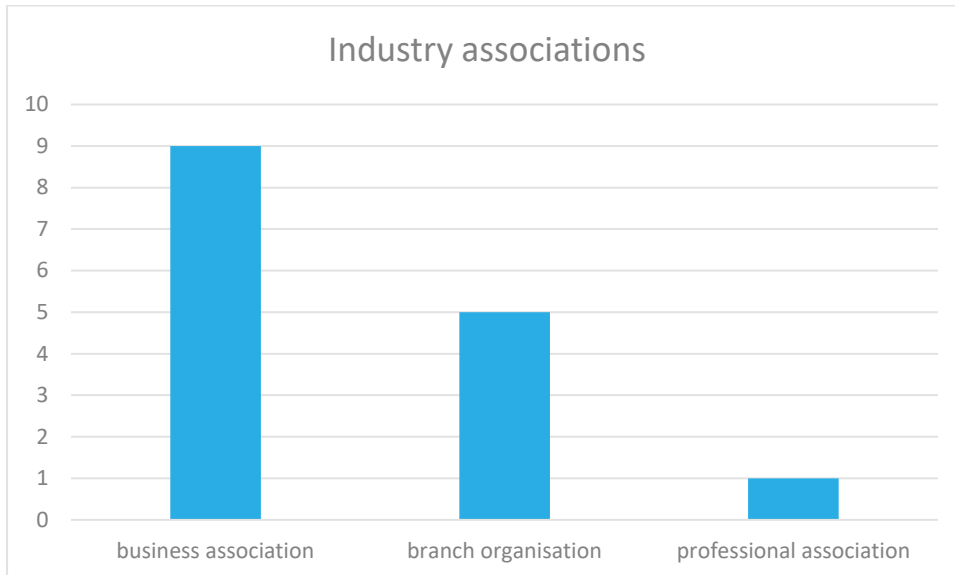
The above analysis summarises the contradictory and ever-changing dynamic in the construction sector regarding energy efficiency and particularly building renovation, characterised by the dependence on public support programmes for the low-cost segment and the unwillingness of the innovation leaders to engage in the policy making process due to the expectation that their products would not be competitive in this environment. A particular point of attention is to develop a general positive attitude towards the application of more sustainable and predictable policies, and that aspects is valid not only for producers and distributors currently being defined as generally uninterested, but also for the professional chamber of architects, which is a key actor in the process. However, there are strong allies among the sector, which are already actively collaborating and participating in roundtable (and potentially technical working groups), which gives good exposure of the project in the sector and is provides a promising perspective for the future developments.

**V.INDUSTRY ASSOCIATIONS**

**Number of stakeholders per group**

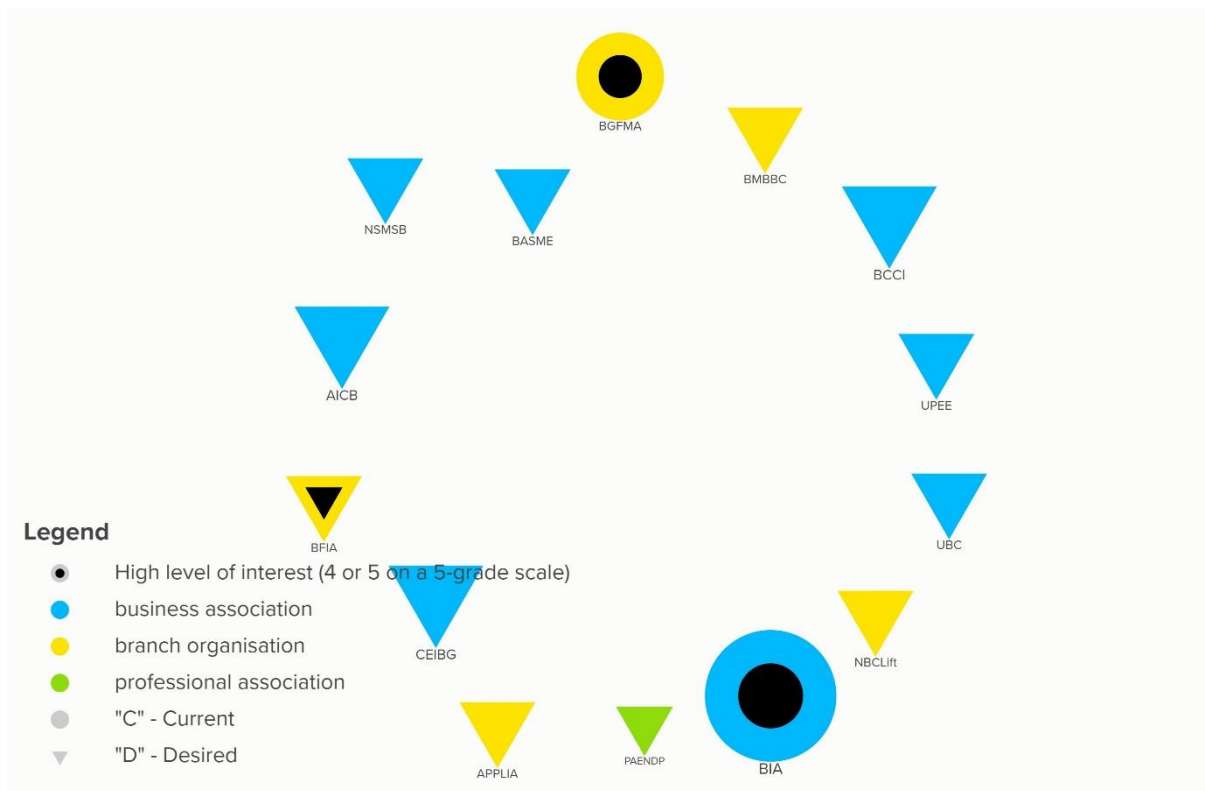
In the group of industry associations, a total of 15 organizations are identified and analyzed, including 9 business associations, 5 branch organisations related to different economic sectors important for the development of energy efficiency projects, and 1 professional association. Within the business associations, there is a clear distinction between organization supporting SMEs and unions of large businesses which are in many cases nationally represented and have a legally constituted role in the policy making process. Within this group,

and acting as the main aggregator is of the Bulgarian businesses, is the Bulgarian Industrial Association (BIA), which is a direct partner in the BeSMART project and active co-organizer of the national roundtables.



### **Influence, interest and attitudes**

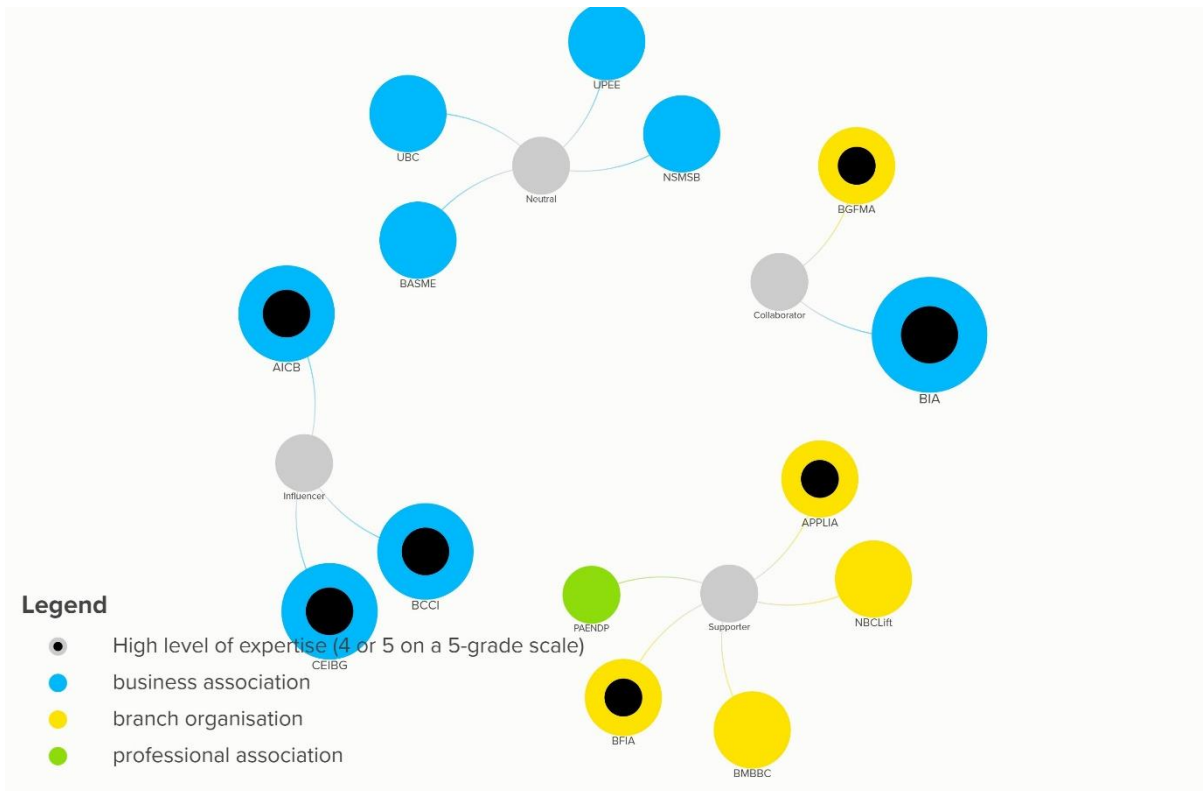
The analysis according influence, interest, and attitudes towards the major goals of the project shows that besides BIA and the Bulgarian Facility Management Association (BGFMA), there are not many organisations demonstrating explicit interest and support (demonstrated by the triangular shape). Besides BIA, the large industrial associations are evaluated as having a considerable level of influence over the policy-making process, while the branch organisations and the SMEs associations are considered as less influential and evidently distant from the topic, with the exclusion of the Bulgarian Doors and Windows Association, which is naturally interested in the proceedings. In this relation, it is very important to mobilise the internal channels of BIA, as well as the traditional and specialized media, in order to generate interest towards the topic and to motivate them to get actively involved in the roundtables. In many cases, direct contact with key decision makers could also be important, especially in expectation of the launch of the new “Competitiveness” national programme and to a certain extent, specific projects under the Recovery and Resilience Plan.



### Type of involvement – influence - expertise

The actors within this group are more or less equally distributed between collaborators, supporters, influencers and neutral. The natura collaborators, as already evidenced by the roundtables in May and October, are BIA and BGFMA, however, the group of supporters is also a big one, including actors with high level of expertise. One of the most challenging group is that of the influencers, consisting of the business associations of the large industry, which is legally represented in many of the institutions of the legislative and executive power, and are also very active in the media. There are unfortunately not considered as project supporters yet, which presents one of the main targets of the engagement campaign. Among the neutral organisations are most of the SMEs associations, which should also be targeted via the general media and through direct exchange, and have to be monitored for expressions of specific interest in the topic. It is also to note that most of the supporters and collaborators are outside of the subgroup of business associations, which is indicative of the still unequivocal apprehension of energy efficiency topic in the whole society, and certainly in the business sector, being overdependent on (not so abundant) public financing for energy efficiency projects and hardly hit by the energy crisis of the last months.

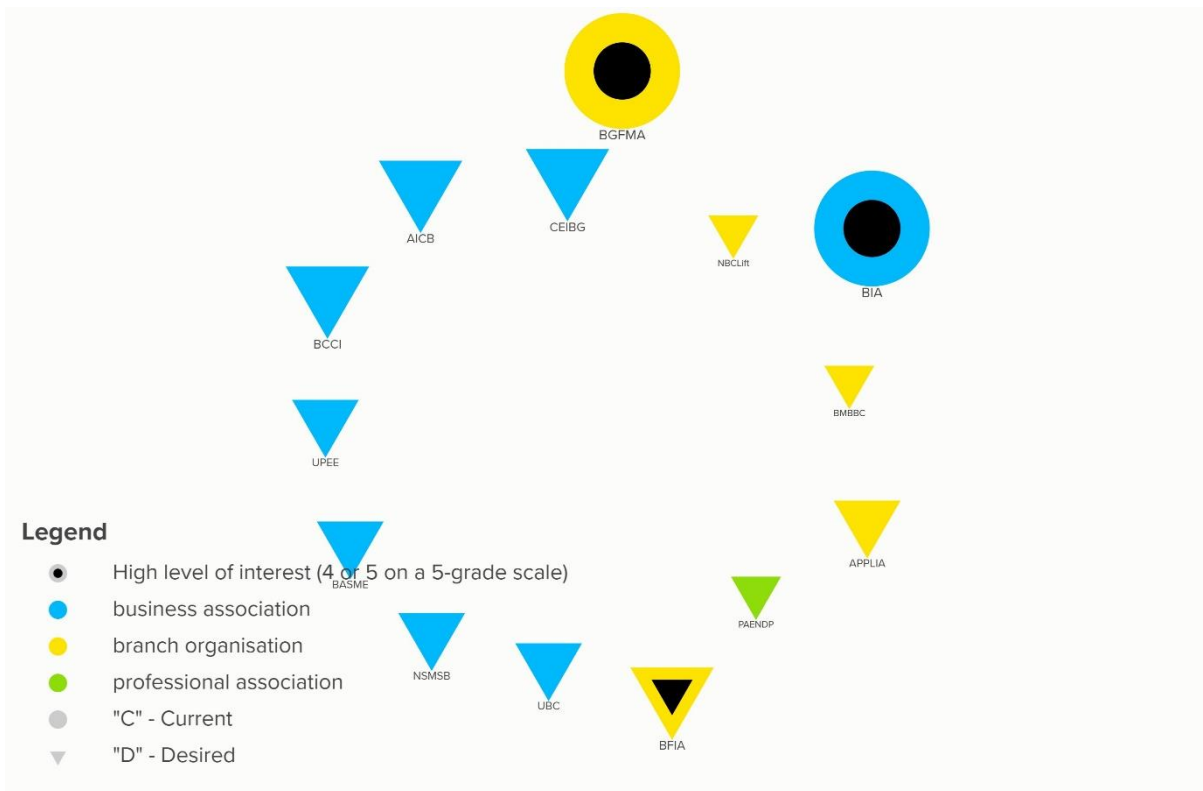




### Necessity of involvement, attitude and interest to engage

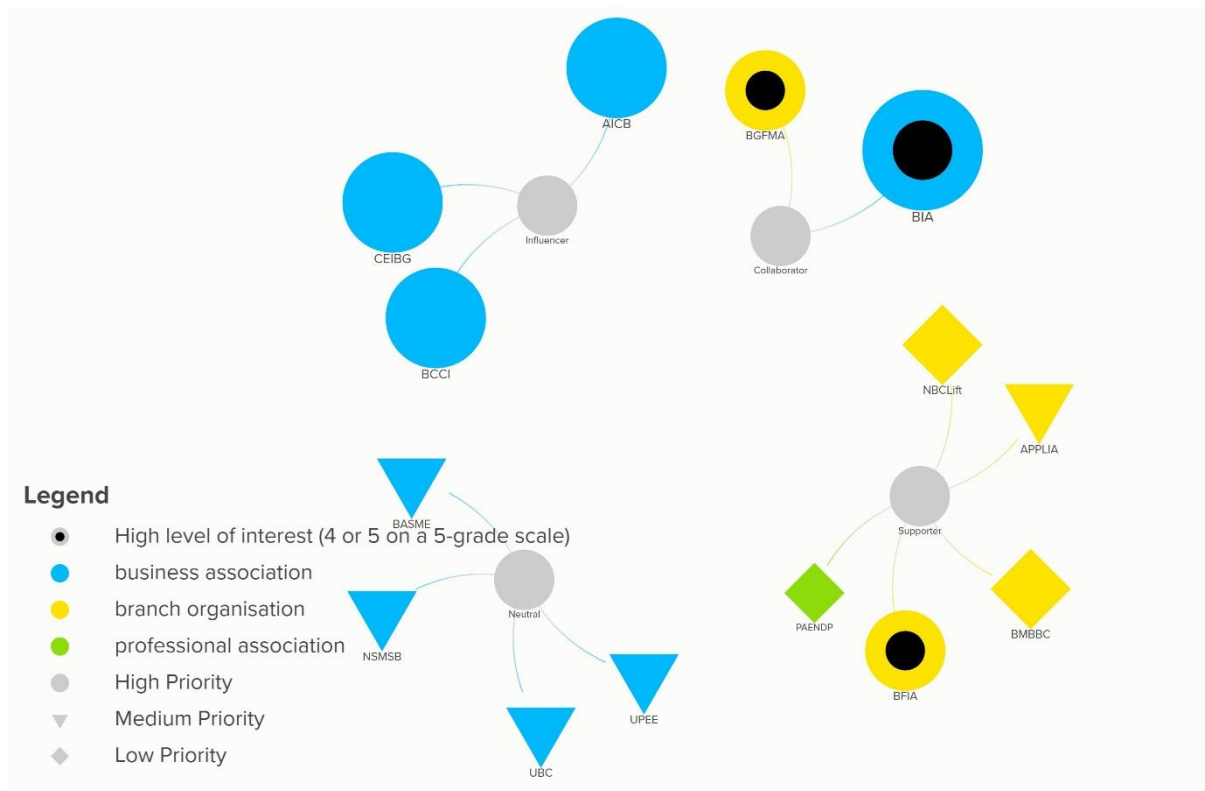
The analysis of the necessity of involvement, attitude and interest to engage provides a clear picture for the priorities of the engagement activities of the project. The key actors are BIA and BGFMA, which is considered to be a main vehicle for the application of innovative financing schemes in the building sector. Both are considered as project supporters, which is definitely a positive feat. On the other side, organizations which are deemed necessary to involved (bigger size of the shape) due to their involvement in the general policy making process or specific expertise, are not yet considered as supporters, which directs to additional communicational efforts in towards these actors.





**Influence – priority – role – interest**

Under this 4-variable analysis, it has become evident that the high priority actors are displaying different characteristics, which is indicative for the need of an individual approach. The levels of interest and the expected roles are quite varied, as the direct project partners and the branch organisation closely related to the topic are expected to be easily involved, which is however not applicable to the business associations representing the large industries. Most of the medium importance actors are identified as influencers, meaning that while they are mutually replaceable (as considers the engagement strategy), they are important for the communication action to external audiences and other stakeholders' group. In that respect, in specific cases, the individual attention to these stakeholders is equally important, supported by the general media campaign.



**Conclusion: specific actions needed for the stakeholders’ groups**

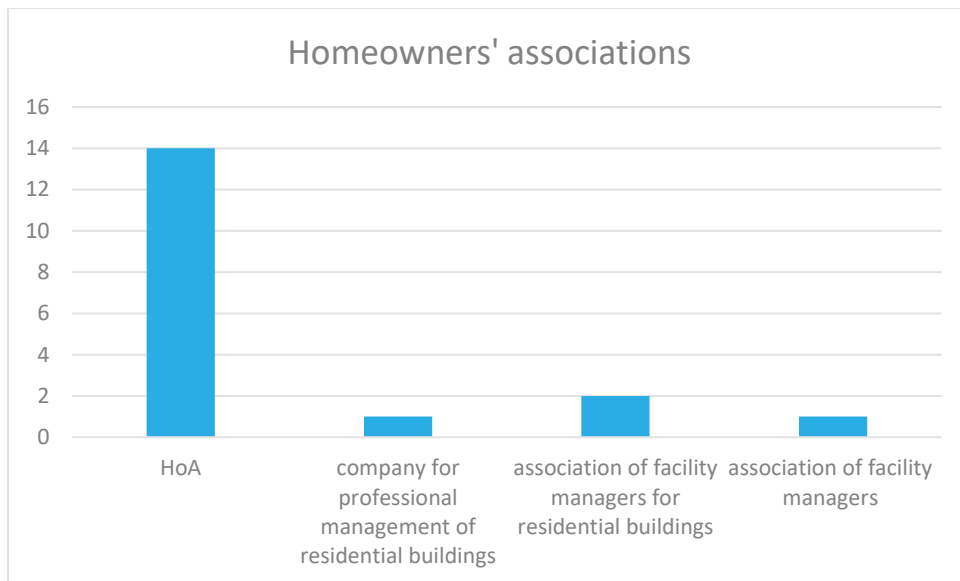
The stakeholders’ group of industry associations displays a relatively clear dynamics, dominated by few organisation which are natural collaborators with high level of interest and expertise (BIA and BGFMA) clear differentiation between the influence and current levels of engagement in the policy making process of associations of large business and of SMEs, and still limited involvement of relevant branch associations. There is an obvious need to stimulate the participation of these groups of actors, which could be done via a combination of various channels, among which the most important would be the direct communication supported by general media representation of the key outputs of the roundtables. The process is supposed to be supported by the imminent adoption of public support programmes – most notably the “Competitiveness” national programme and the Recovery and Resilience Plan, which should be used to attract the attention and enhance the engagement of the identified stakeholders.

**VI.HOMEOWNERS’ ASSOCIATIONS**

**Number of stakeholders per group**

A total of 18 stakeholders are identified as important for the projects’ implementation, including 14 Homeowners’ associations with significant knowledge and understanding of the consumer market and/or proven interest in energy efficiency policies and EU operative programs, 1 company for professional management of residential buildings, 2 Associations of facility managers for residential buildings (SAS Centre for sustainable housing and Association of condominium management companies) and 1 Association of Managers (Bulgarian Facility Management Association) with the role to develop the market, provide information about

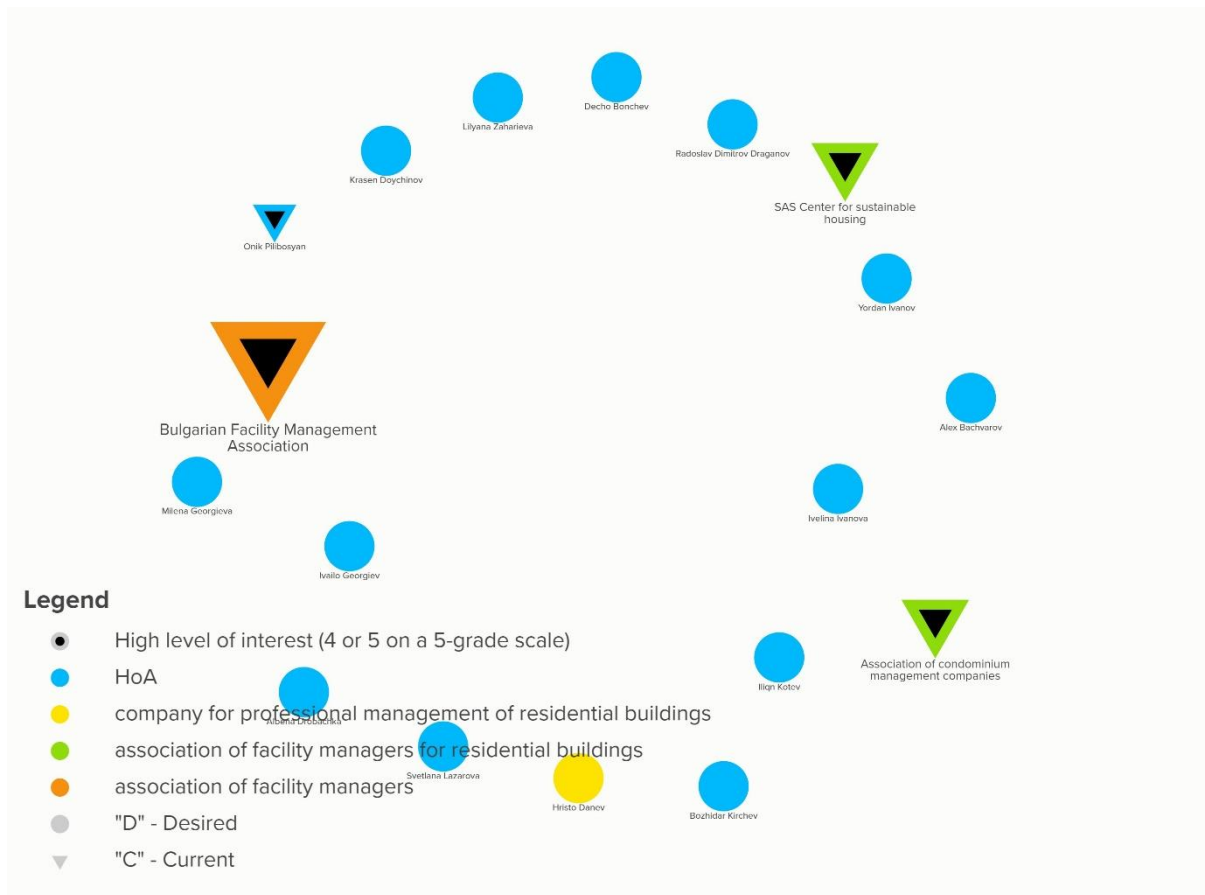
resources for specialized funding lines and also technical expertise regarding energy efficiency in the residential sector.



### Influence, interest and attitudes

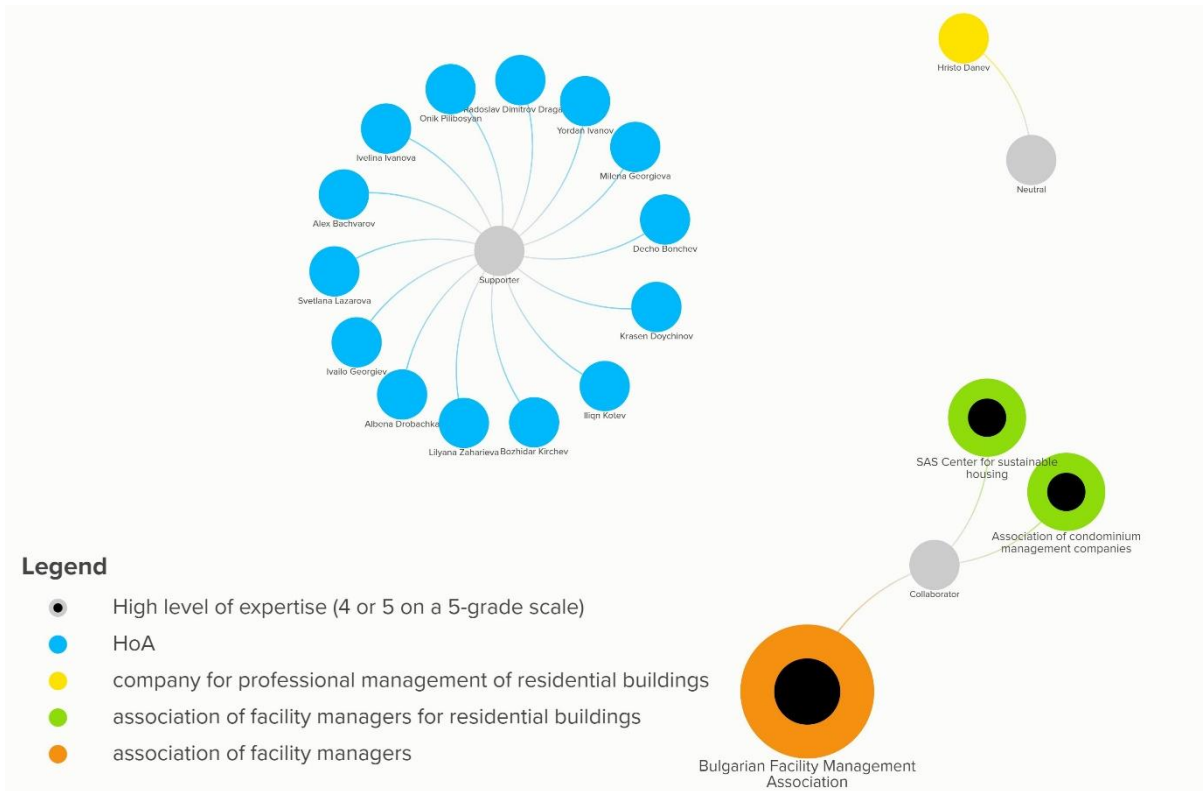
Given the nature of the activities of the project, it is no surprise that the analysis in terms of importance of involvement and influence shows that there are only a few stakeholders who are considered as both being highly relevant for the implementation, having a strong influence over other actors on the market, and being able to attract other participants and supporters in the events.

The analysis clearly identifies the Bulgarian Facility Management Association as the most influential and supportive stakeholder due to the association's close cooperation with governmental and local authorities regarding legislative changes concerning property management, processes, physical assets, and infrastructure. The 2 associations of facility managers for residential building are also identified as important and interested in the projects activities stakeholders. This is explained with their primary goal to promote the development of sustainable housing and to support the efforts of owners' associations in multi-family residential buildings to achieve a high quality of habitation and living environment and to introduce and maintain high standards in the performance of management and maintenance services. The numerous homeowner's associations and the one company for professional management of residential buildings are identified as desired beneficiaries of the projects activities. Their involvement is minimal and they do not have a direct influence on the policy making process however the efforts of all other stakeholders are targeted at supporting and benefiting the HoAs.



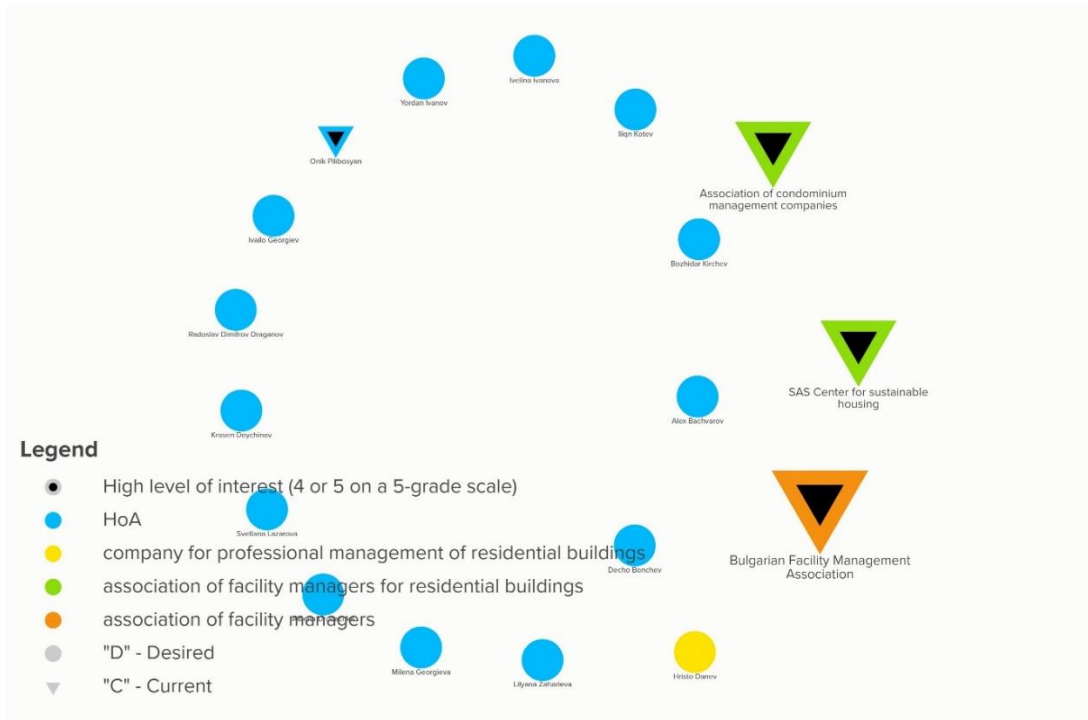
### Type of involvement – influence - expertise

The analysis of each type of involvement provides important information about the desired role of each group and is key for defining the stakeholders' groups which will be specifically targeted in the engagement plan. As described in the visualisation below, the Bulgarian Facility Management Association, the Association of condominium management companies and the SAS Centre for sustainable housing are referred to as implementation experts, and they are already practically involved in the activities either as direct partners or as close collaborators on various initiatives. Additionally, the different homeowner's associations are identified as supporters, which is a good prerequisite for the organization of the events, also given the fact that they are all considered to have some level of expertise and interest. The one company for professional management of residential buildings in the diagram below is identified as neutral and lacking the necessary knowledge and understanding on energy efficiency and RES-related issues.



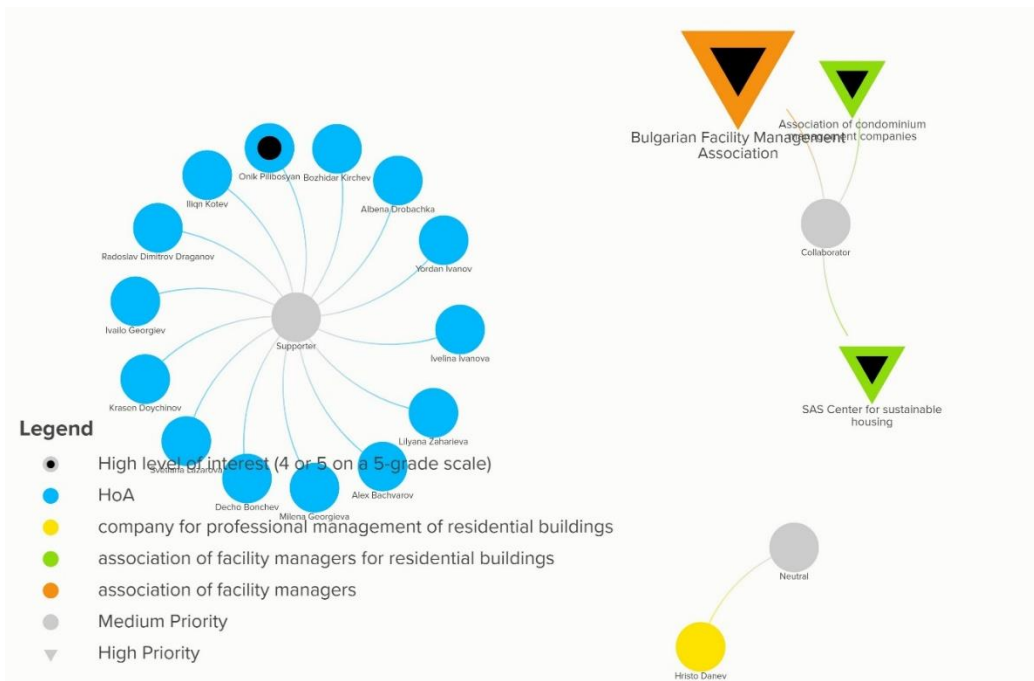
**Necessity of involvement, attitude and interest to engage**

The analysis of the necessity of involvement, attitude, and interest to engage is the most important one to identify the weak points and gaps in the developed stakeholders’ map. Again, the situation for the Bulgarian Facility Management Association, the Association of condominium management companies and the SAS Centre for sustainable housing is quite clear. These large national-level association are considered to be irreplaceable at this stage of market development and thankfully are interested in engaging and improving. Furthermore, it is obvious that specific efforts and individual approaches should be developed targeting the involvement of different individual homeowners’ associations. While it cannot be differentiated which homeowners’ association is more important to be involved than the other (hence the smaller size of the shape), the desired situation of them being supportive (i.e. transforming the shape from rhomboid to circle) is already achieved and there is even one stakeholder who has expressed great interest and involvement in the market development as a whole.



**Influence – priority – role – interest**

This 4-variables approach reveals the priority for involvement of the different stakeholder sub-groups in relation to their interest and value for the project. In this regard, again it can be stated that the prerequisite for successful implementation is low given the interest and motivation of the implementers and supporters to join – them being the market shapers. However, even though mutually interchangeable (hence the medium priority for each of them), the different individual homeowners’ associations remain the biggest challenge but they are considered interested to collaborate, despite the political insecurity at national level.



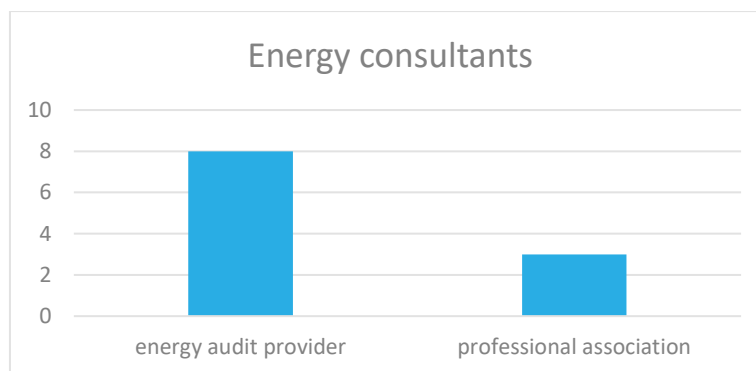
### Conclusion: specific actions needed for the stakeholders' groups

Based on the above analysis, it is clear that within the development of the BeSMART activities, the established connections between the Bulgarian Facility Management Association, the Association of condominium management companies, the SAS center for sustainable housing and the various homeowners' associations should be maintained and further developed. Furthermore, specific attention is needed for the segment of the homeowners' association, which are generally willing to get involved in the policy-making process, in order to develop a greater balance between consumers and industry representatives for greater security, higher quality services and clear market regulations. The Associations should also tackle the lack of commitment and responsibility among building residents and homeowners' associations by maximising information about rights and obligations within condominiums.

## VII.ENERGY CONSULTANTS

### Number of stakeholders per group

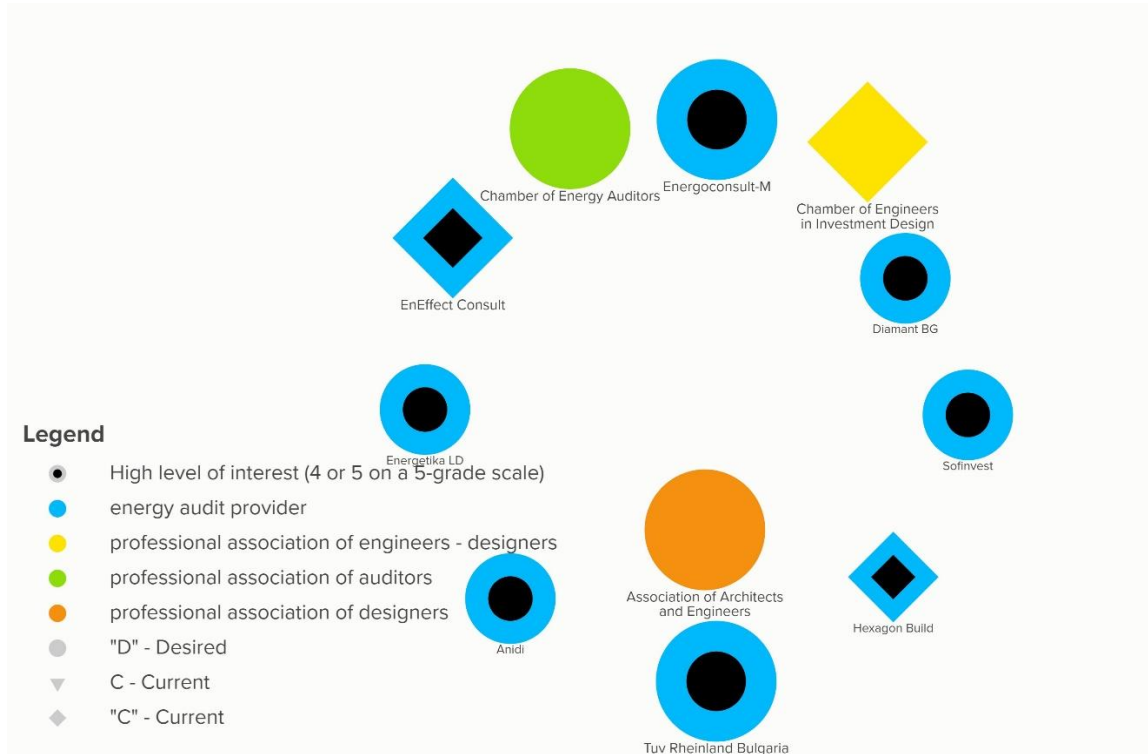
Considering the important role of the energy auditors and the designers in the building renovation proces, a total of 11 stakeholders were identified as important for the projects' implementation, including 8 companies licensed to perform energy audits and issue buildings Energy Performance Certificates (EPC) and 3 professional associations (Association of Architects and Engineers, Chamber of Energy Auditors and Chamber of Engineers in Investment Design). Although not currently involved in the policy making process the energy auditors are actually the ones who are shaping the renovation projects as based on their analyses and recommendations are developed the technical specifications for the public procurement.



### Influence, interest and attitudes

The analyses shows that energy auditors have high level of interest, mainly because they are, directly involved in the first phase of the renovation projects as energy audits are obligatory for all buildings to be renovated. Thus, developing the market means for them new assignments. Unfortunately, only few of them are currently involved in the policy making process, while the others are more or less market oriented considering that there will be enough business opportunities for them stage and policy measures will not reflect on that.

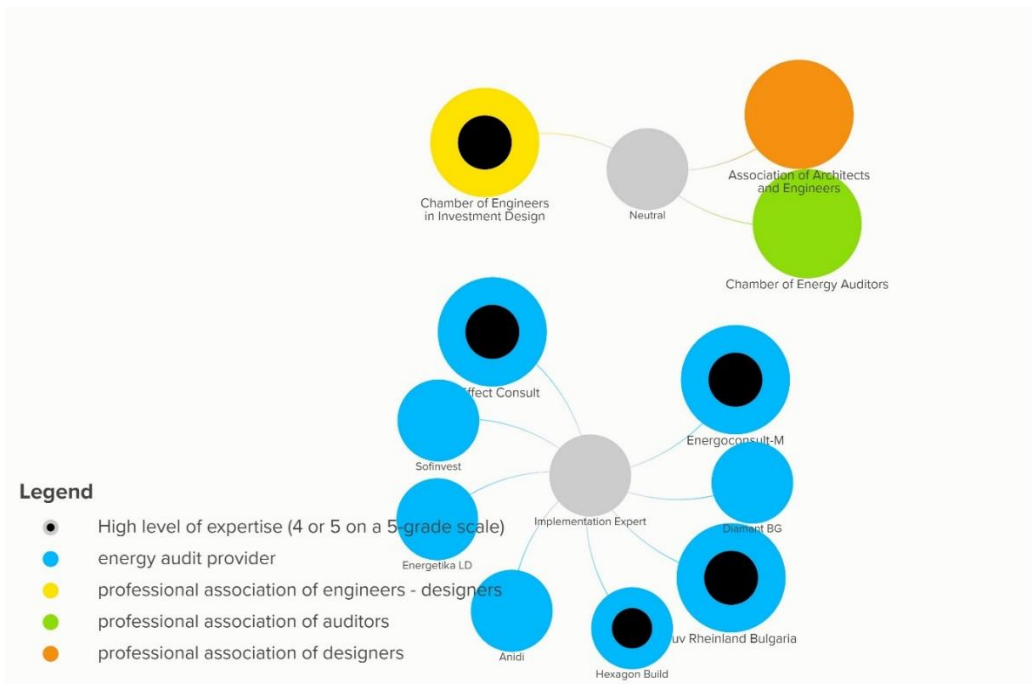
Similar is the situation with the designers and engineers represented by their associations who have high level of influence but do not recognize the needs of reforms and reshaping of policies.



**Type of involvement – influence - expertise**

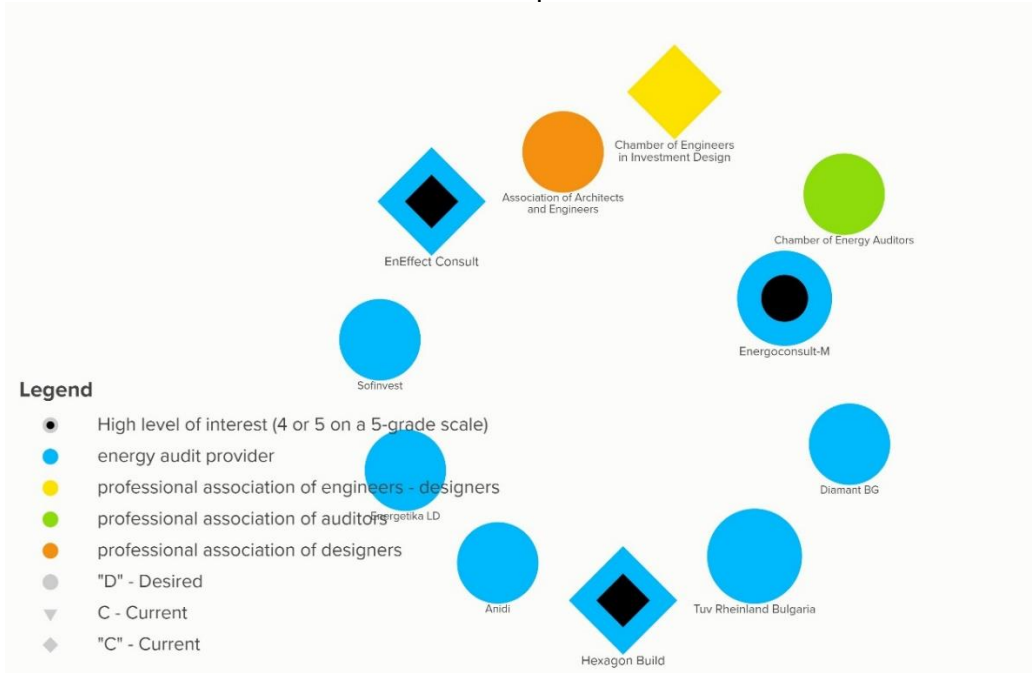
Less than half of the stakeholders in this group demonstrate high level of expertise on policies related to energy efficiency and it is evident by their lack of interest in the needed reforms in the sector. Based on their role in the renovation process they are divided into two groups: Implementation experts and Neutral. The first group consist of energy auditors who are directly involved in the renovation projects, thus implementing the policies on building level. The second group consisting of professional associations who are not part of the implementation process, but actually have a higher level of influence on shaping the policies. The role of the second group is to protect the interests of their members who are usually conservative and do not recognize up-to-date practices that lead to deep renovation of the building stock.





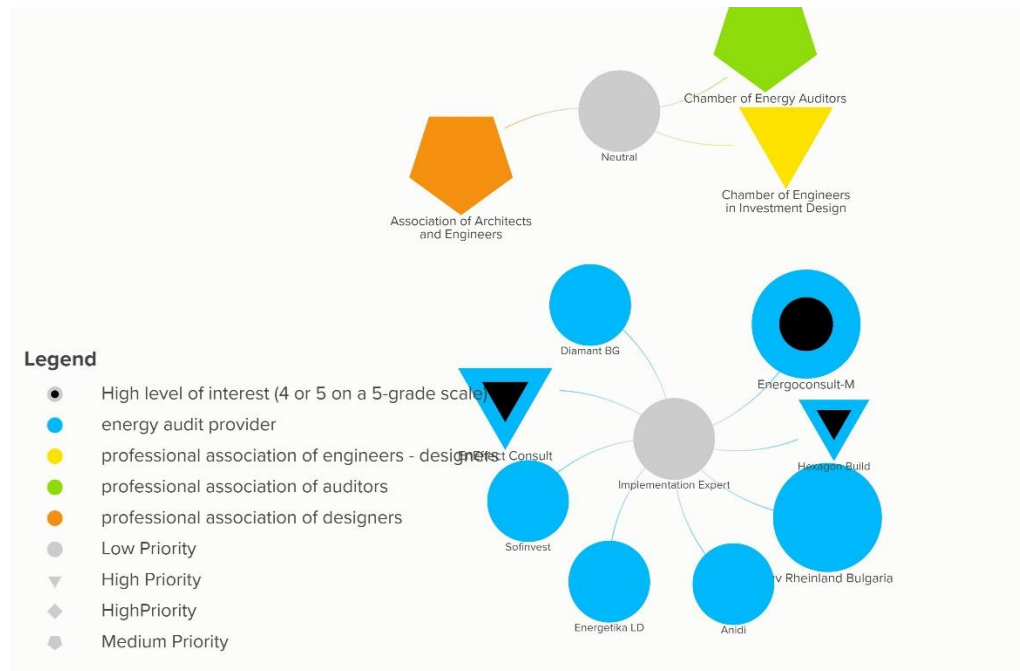
### Necessity of involvement, attitude and interest to engage

The analysis of the necessity of involvement, attitude and interest to engage is the most important one to identify the weak points and gaps in the developed stakeholders' map. Only few of the more experienced energy auditors demonstrate high level of interest on the project activities and it is obvious that additional efforts are required to involve the others in the policy shaping process. Although not considered with high level of expertise (see above), this stakeholder group, being aware of the current construction practices, have the knowledge and experience to support the policy makers (local and national authorities) in developing the right instruments and definitions for deep renovation of the national building stock.



### Influence – priority – role – interest

This 4-variables approach reveals the priority for involvement of the different stakeholder sub-groups in relation to their interest and value for the project. In this regard, the professional associations have higher priority than the auditing companies as they can reach and influence all their members on national level, while the auditing companies in most cases can act locally. Of course, auditors with high level of technical expertise are irreplaceable as such expertise is strongly required for setting up ambitious, but realistic goals, reforms and instruments.



### Conclusion: specific actions needed for the stakeholders' groups

Based on the above analysis, it is clear that within the development of the BeSMART activities, the established connections with the technical experts should be extended, through involvement of the most experienced ones. However, special attention has to be paid to all energy auditors and professional organisations in order to raise their knowledge in deep renovation projects and financial instruments for their implementation. This is an ambitious task in a market currently driven by “lowest price” criteria – one of the main barriers for penetration of high-quality renovation projects, but it should be widely communicated that quality has its own price and more efforts in one project for deep renovation may have the same benefits for the experts, compared to participating in numerous projects with questionable quality.

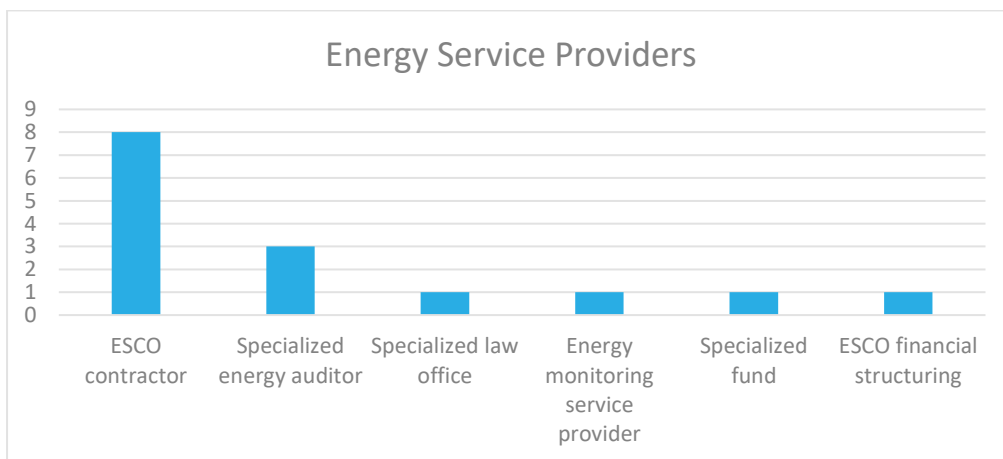
## VIII. ENERGY SERVICE PROVIDERS

### Number of stakeholders per group

The group of energy service providers is one of the most multifaceted one, with actors with different specification attempting to position themselves on an emerging market which requires a variety of complementary services for many of which there is still no established practice. Out of the 15 studied stakeholders, 8 are active ESCOs, even though with different

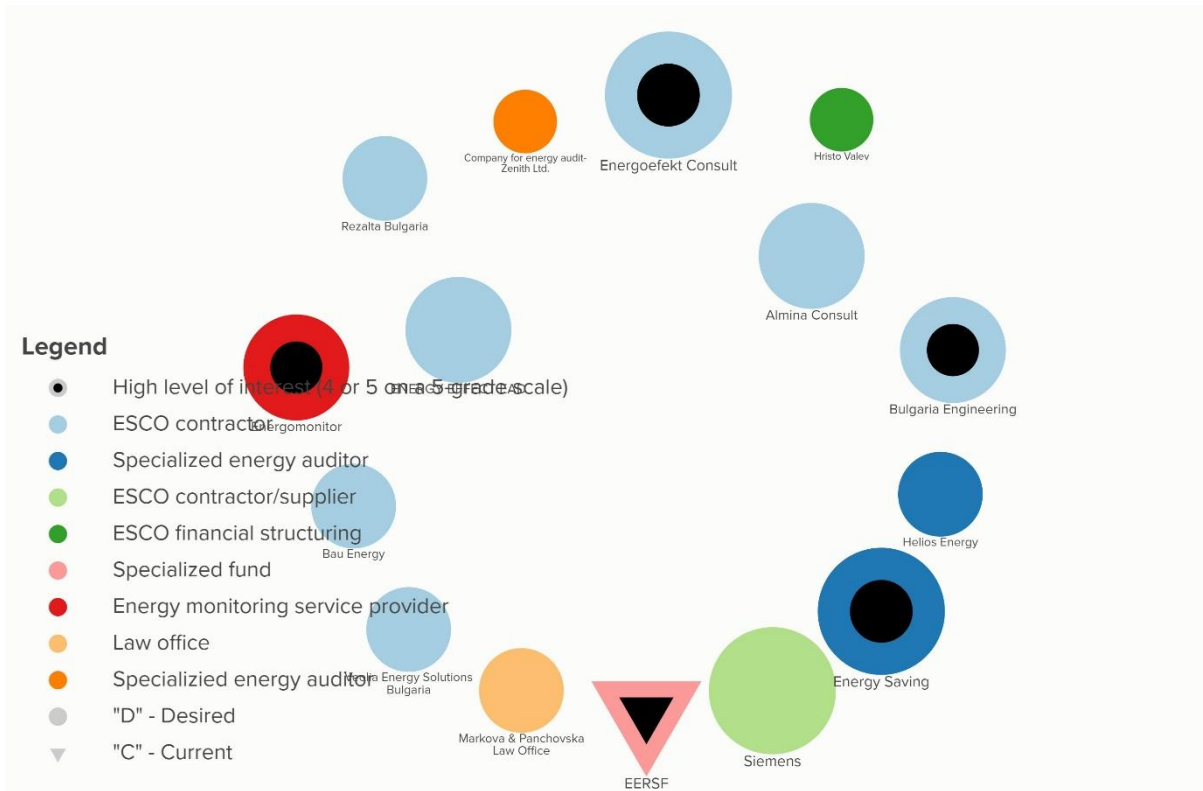
market exposure. There are also 3 energy auditors which provide specialized services enabling energy performance contracts, and 4 individual actors which are important for the functioning of this market segment, including a specialized fund providing guarantees and cessions of ESCO contracts, a financial consultancy enabling the structuring of the loans, an energy monitoring service provider securing the validation of the actual performance of the implemented measures, and a specialized law office.

The analysis deliberately excludes the energy suppliers, which in certain cases are also offering ESCO services. This is due to the fact that the electricity supply market is dynamically changing due to the ongoing liberalisation process, and it is still not possible to provide a stable picture of the new entities which are staking a claim on it. On the other hand, the three fixed operators of the distribution network and electricity suppliers on the regulated market – CEZ, Energo-Pro, and EVN – demonstrate a completely different dynamics due to their law-defined oligopoly position in the past decades, and will be targeted separately on specific issues during the roundtables’ development, also given the recent change of ownership in CEZ – Bulgaria.



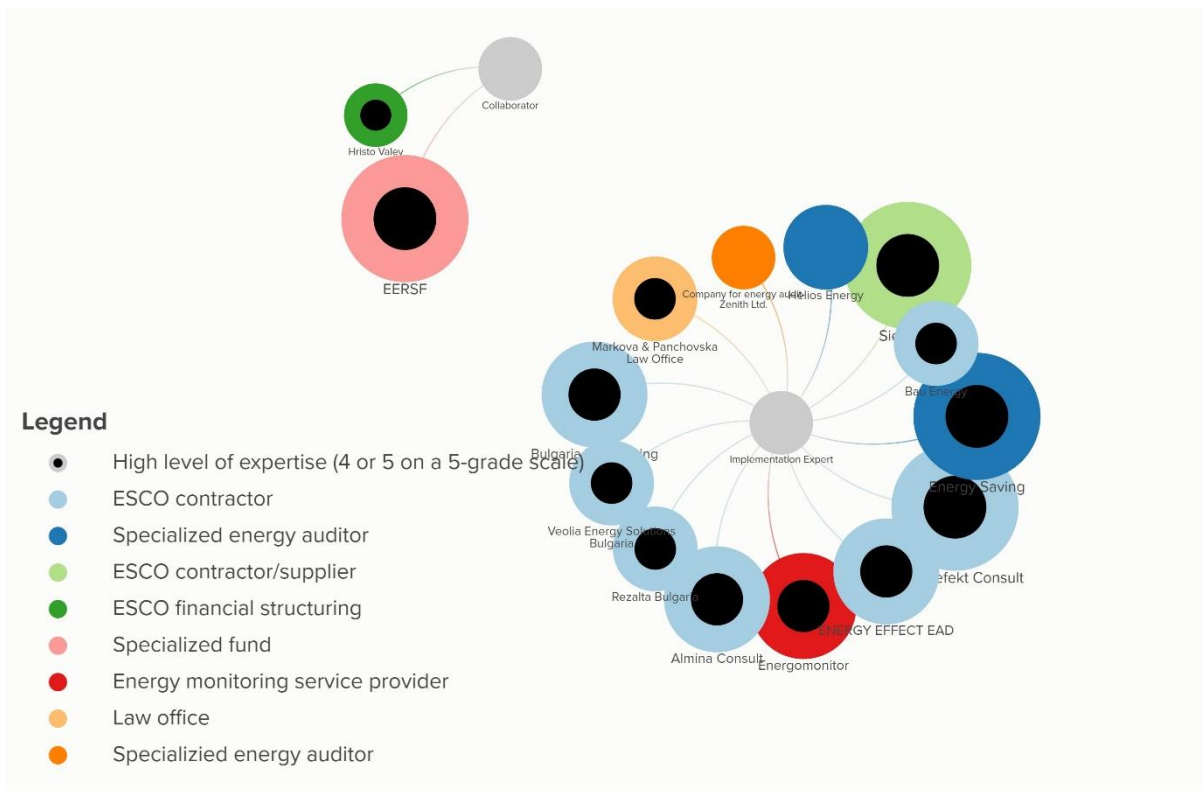
### **Influence, interest and attitudes**

At the beginning of the action, none of the stakeholders were considered as a genuine supporter of the project, although the initial developments indicated that the roundtables could have full support from the Bulgarian Energy Efficiency Fund, which is intrinsically interested in the opening of the market for implementation of financial mechanisms. Few of the actors in this group were aware of the action at all, which is a clear sign for more active communication efforts to this group, including via direct communication. There are however several actors that are evaluated as interested in the process development due to their previous engagement in similar initiatives (e.g. the national nZEB expert council), and/or due to their active position in representative professional associations. Not surprisingly, these stakeholders are considered as sufficiently influential, meaning that their participation in dedicated session should be ensured by the following actions.



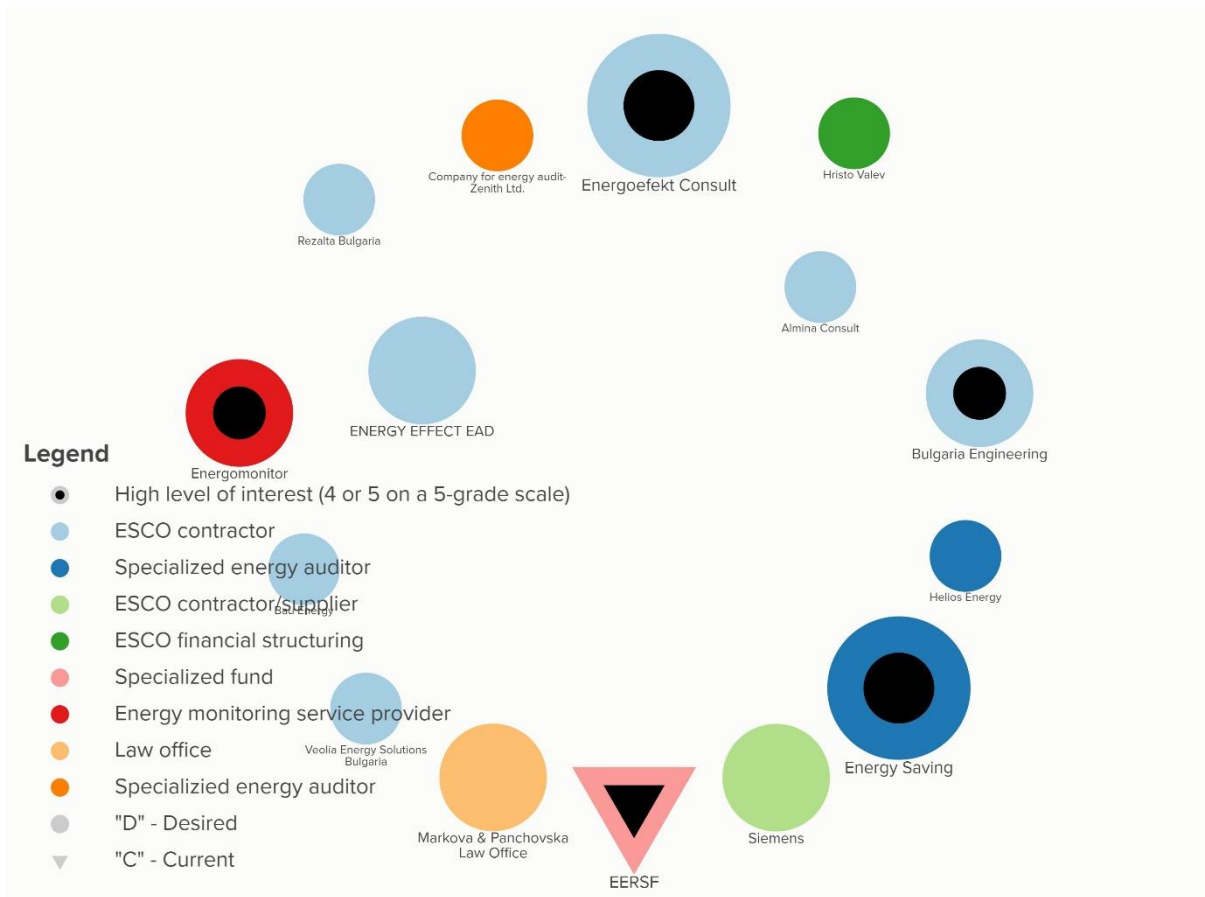
**Type of involvement – influence - expertise**

While naturally most actors in this area are qualified as experts in project implementation, possessing sufficient level of professional know-how and market understanding, few of them are considered a genuine project collaborators. Interestingly enough, these two are the ones most related to the structuring of the financing, providing further proof of the necessity to open up the energy efficiency market for introduction of innovative financing mechanisms. In the main group of (investment project) implementation actions, there are no significant variations in terms of influence, as it can be again observed that actors with previous involvement in the policy making and regulatory framework development process are being in more advantageous position.



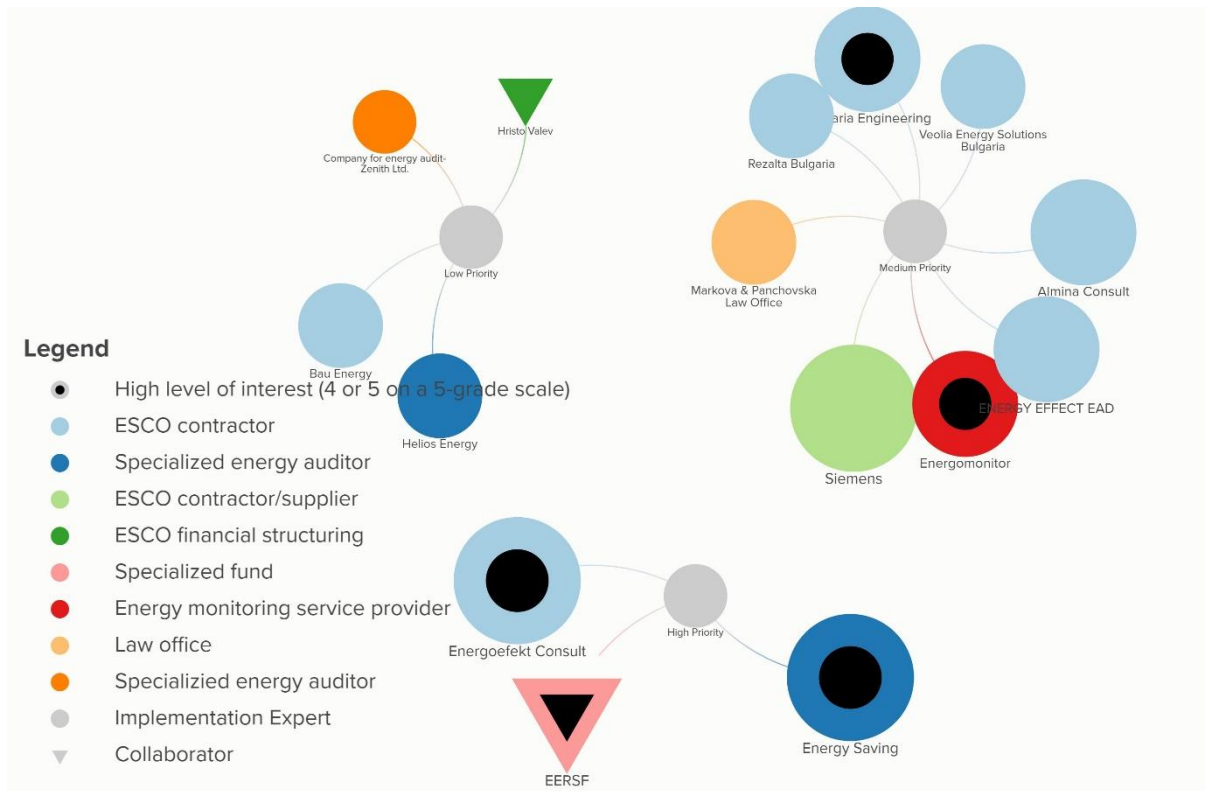
### Necessity of involvement, attitude and interest to engage

The analysis of the necessity of involvement, attitude and interest to engage shows that the opinion leaders, or the most necessary to engage organisations, are interested in the topic; however, at this stage (besides the Bulgarian Energy Efficiency and Renewable Sources Fund), they cannot be qualified as project supporters, rather being unaware or neutral towards project's endeavours. On the other hand, there are many actors with lesser necessity of involvement, which could however be important in the implementation of certain policies and the market integration of various financing mechanisms, meaning that they would have to be well informed regarding the outcomes of the roundtables and, when possible, steered into more active participation via the most suitable communication channels for the group in general.



**Influence – priority – role – interest**

Within the analysis, the highest priority of involvement is given to institutions (and notably, individuals with managerial functions within these institutions) which have previous participation in the policy making and normative framework development process, including the Energy Efficiency and Renewable Sources Fund, which is practically owned by the national government, represented by the Ministry of Energy. At medium level of priority we are finding organisations which are mutually replaceable, but many of them, due to either their influence or interest, could become valuable members of the process if approached properly. There are certain actors of lower priority, which would be targeted via the general communication towards the target group and will be monitored in case they show higher interest for engagement or initiate exemplary projects which could be showcased



**Conclusion: specific actions needed for the stakeholders’ groups**

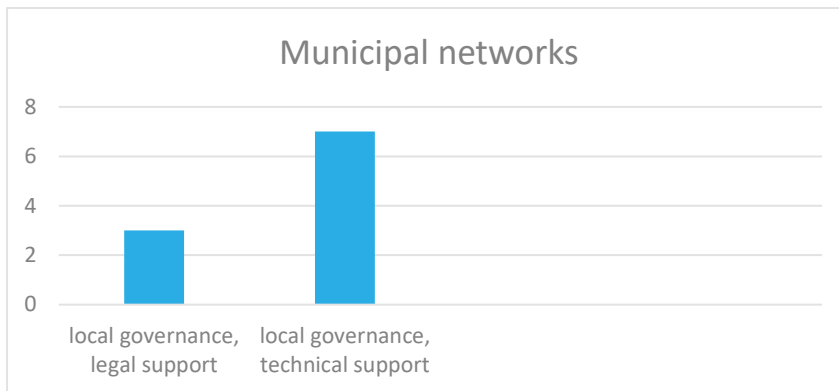
The analysis of the group of energy consultants represents a clear internal dynamic with well-defined opinion leaders (EERSF, Energoefekt Consult, Energy Saving), several influential and mostly interested organisations, and numerous actors with high level of expertise in the implementation of energy efficiency projects but less interest and current engagement in the policy making process. This distribution suggests individual attention to the key stakeholders, which would be useful to attract the interest of other organizations to the roundtables. It would be also important to use the institutionalized channels for all other stakeholders (e.g. the networking capacities of the Alliance for Energy Efficiency as project partners) and monitor their activities in order to identify new “stars” and ambitious projects early enough and include them more actively in the roundtables’ organization.

**IX.MUNICIPAL NETWORKS**

**Number of stakeholders per group**

A total of 10 stakeholders are identified as important for the projects’ implementation, including 7 local governance networks providing technical support to municipalities and who also have significant impact on the consumer market and/or proven interest in environmental policies and products. The other 3 stakeholders are local governance bodies who are providing legal support to municipalities in the form of research, analysis, evaluation and development of proposals for change and/or improvement of local government policies, lobbying, etc.

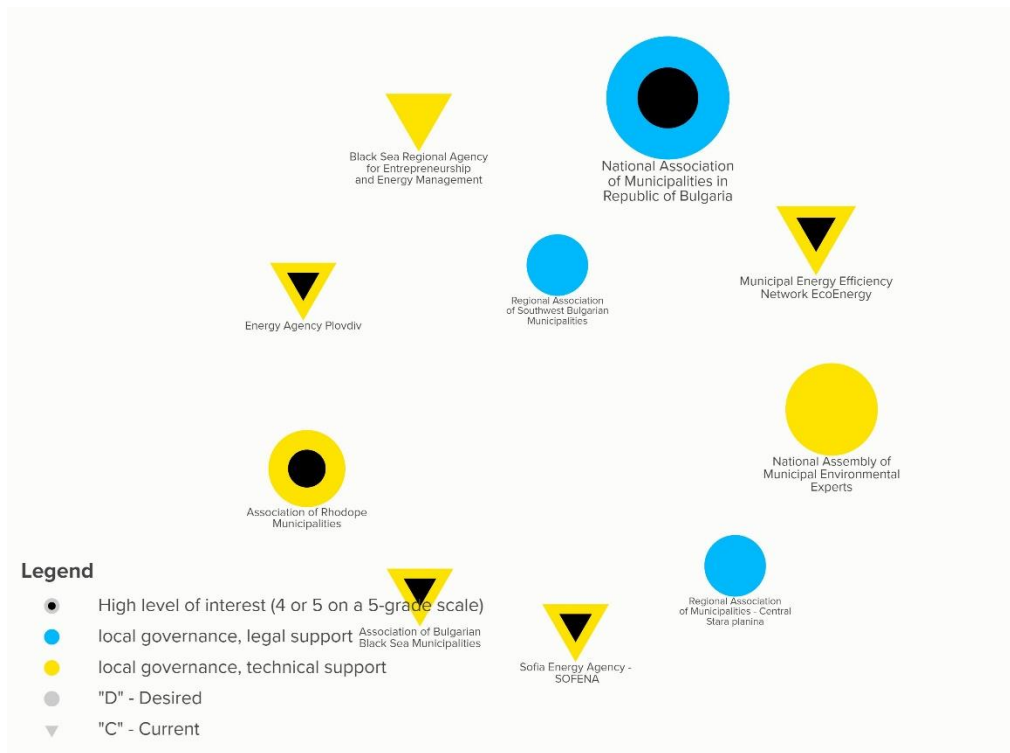




### Influence, interest and attitudes

Given the nature of the activities of the project, it is no surprise that the analysis in terms of importance of involvement and influence shows that most of the stakeholders are considered as both being highly relevant for the successful implementation, having a strong influence over other actors on the market, and being able to attract other participants and supporters in the events. There is a clear and very positive sign that the most influential stakeholder, the National Association of Municipalities in the Republic of Bulgaria has expressed a high level of interest (bullseye) in the projects' activities and is supportive (circle shape) of the project. On the other side, it is also clear that the National Assembly of Municipal Environmental Experts, although obviously important to involve, are not considered interested enough but have expressed they supportive attitude towards the proposed activities.

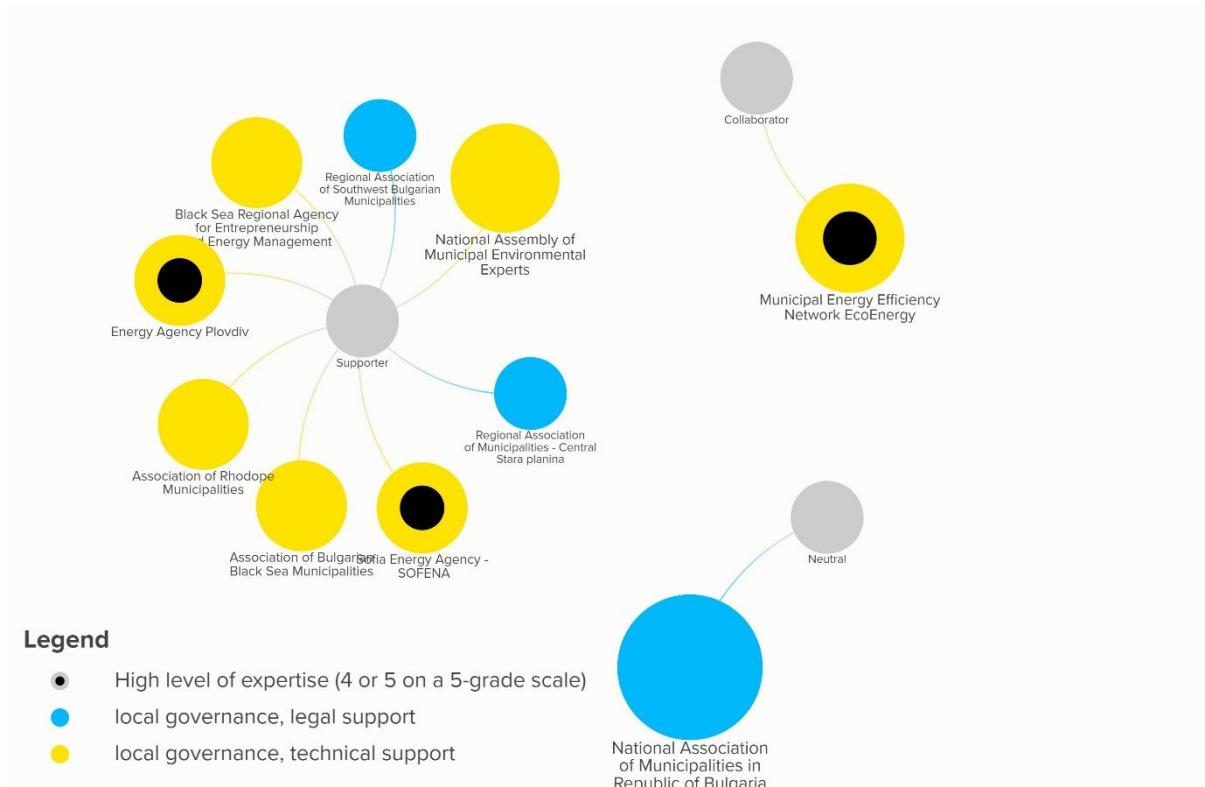
This is explained with the lack of political stability in the country, which repels them from supporting their members for execution of their tasks and obligations, especially in regard to strategic development and planning actions.





### Type of involvement – influence - expertise

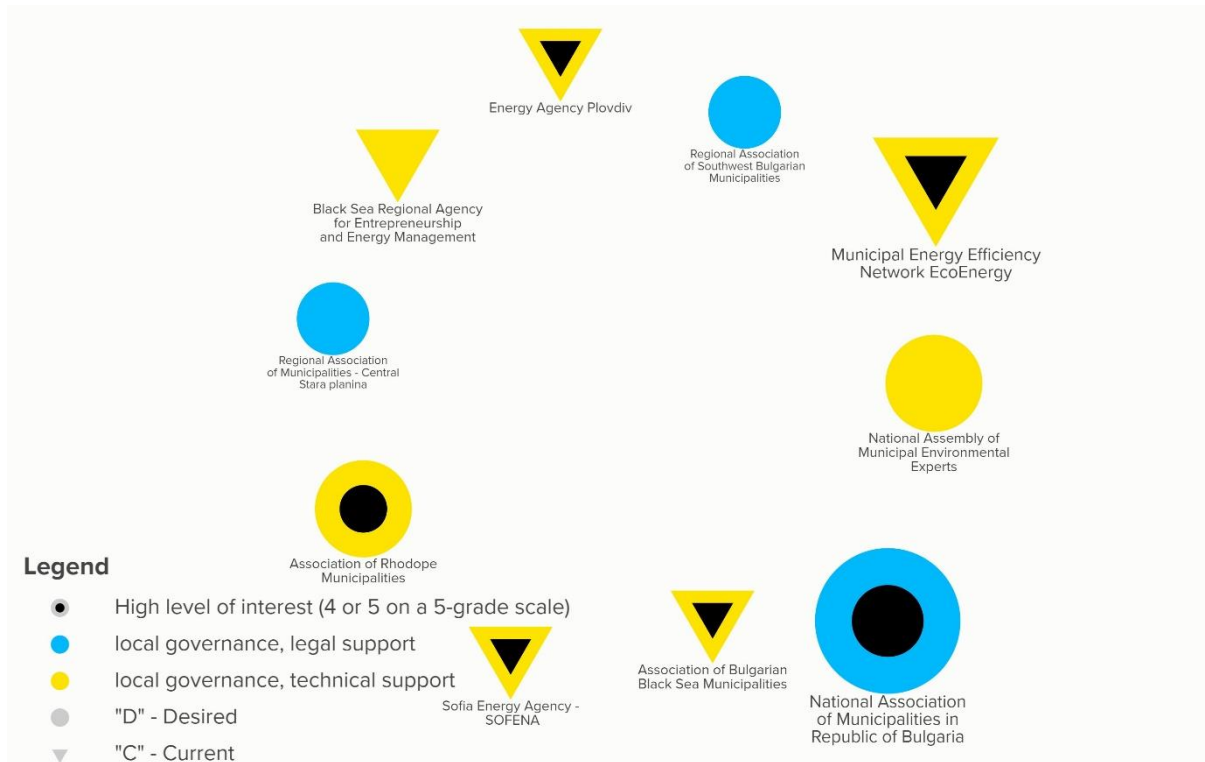
The analyses of each type of involvement provides important information about the desired role of each group and is key for defining the stakeholders’ groups which will be specifically targeted in the engagement plan. As described in the visualisation below, the Municipal Energy Efficiency Network EcoEnergy is referred to as Collaborator, as it is already practically involved in the activities both as direct partner, or with its members as close collaborators on various initiatives. Additionally, the various Agencies, Assemblies and Associations are identified as supporters, which is a good prerequisite for the organization of the events, also given the fact that they are all considered to have high level of expertise. Although the National Association of Municipalities in the Republic of Bulgaria is identified as the most influential stakeholder it is defined as neutral, mostly because of their assumed lack of the expert knowledge on energy efficiency and RES-related issues.



### Necessity of involvement, attitude and interest to engage

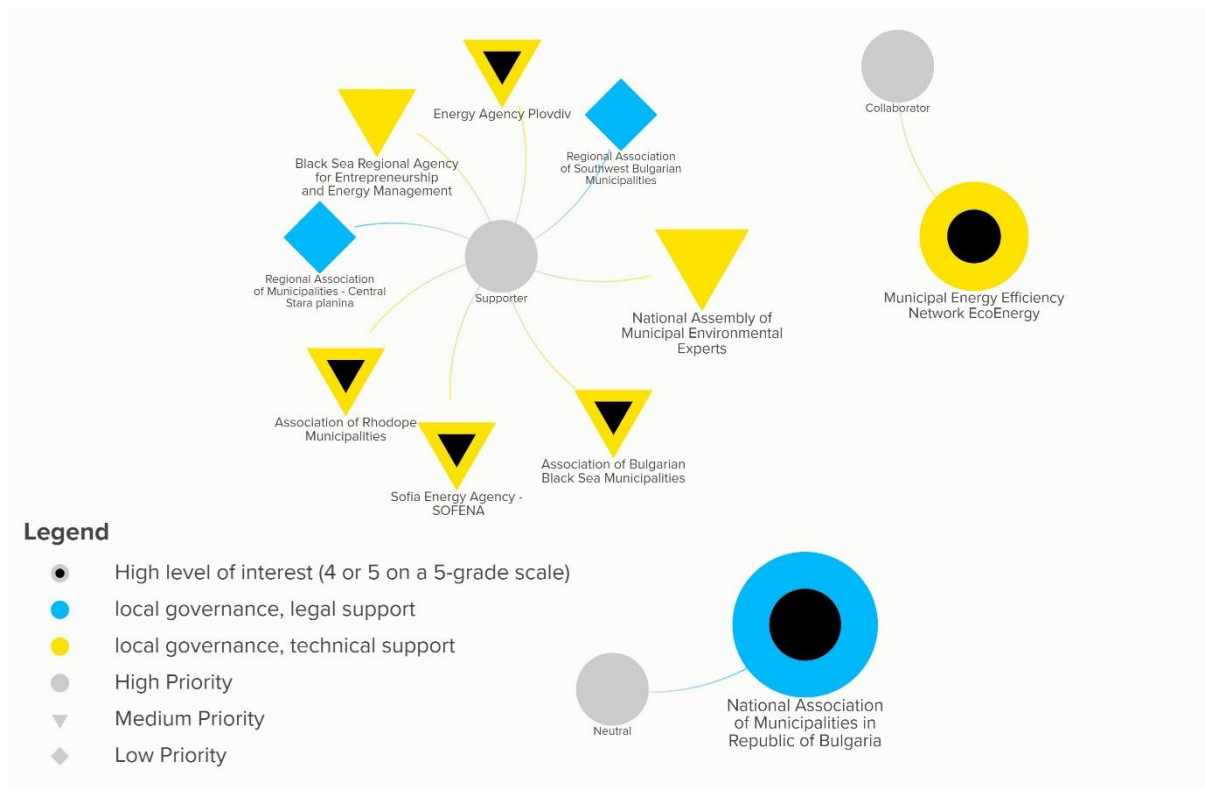
The analysis of the necessity of involvement, attitude and interest to engage is the most important one to identify the weak points and gaps in the developed stakeholders’ map. Again, the situation for most of the various Agencies (Sofia Energy Agency – SOFENA, Energy Agency Plovdiv) and Associations (Association of Bulgarian Black Sea Municipalities, National Association of Municipalities in Republic of Bulgaria, Municipal Energy Efficiency Network EcoEnergy, Association of Rhodope Municipalities) is quite clear, while most of them are already involved and highly interested in the projects activities and outcomes, it is obvious that specific efforts individual approaches should be targeted to further involve and interest the two Regional Association of Municipalities (in Central Stara Planina and the Southwest Bulgarian

Municipalities), the Black Sea Regional Agency and the National Assembly of Municipal Environmental Experts. While it cannot be differentiated which Association and/or Agency is more important to be involved than the other, with all of them having their respective circles of influence and trusted partners, the desired situation of them being supportive is already achieved.



### Influence – priority – role – interest

This analysis reveals the priority for involvement of the different stakeholder sub-groups in relation to their interest and value for the project. In this regard, again it can be stated that the prerequisite for successful implementation are high given the interest and motivation of the implementers and supporters to join – them being the market shapers. However, even though mutually interchangeable (hence the medium priority for each of them), the Regional Associations (Central Stara Planina and Southwest Bulgarian Municipalities) remain a challenge, as they are not considered interested to collaborate, especially given the political insecurity at national level. The biggest challenge is however the active involvement of the National Association of the Municipalities in Republic of Bulgaria, which, although being strongly interested in the topic, remains neutral towards project’s proceedings, being focused on its legally established channels of interventions (e.g. regular representation in the National Assembly and participation in the design of the operational programmes).



**Conclusion: specific actions needed for the stakeholders’ groups**

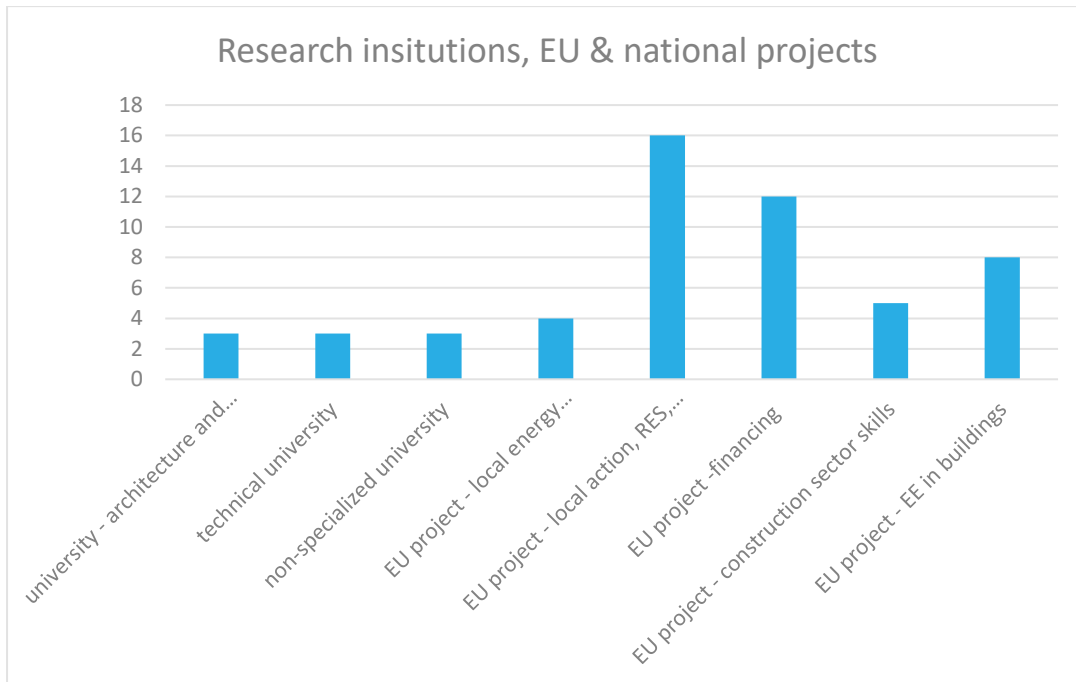
Based on the above analysis, it is clear that within the development of the BeSMART activities, the established connections with the specialized municipal networks and various agencies and associations should be maintained and further improved on. However, the relations with the National Association of the Municipalities in Republic of Bulgaria should be improved as they have to be deeper involved in the national roundtables and accept them as a key policy-making mechanism alongside their established channels. Further attention is also needed for the segment of the regional associations of municipalities and the National Assembly of Municipal Environmental Experts, which are still not actively involved in the policy-making process and base their activities on their understanding of the legal, administrative, and technological process, with insecurity of the national policies seemingly being a major bottleneck. Although there are some stakeholders who can be more actively involved, the other stakeholders are already supporting their members in executing their tasks and obligations, especially in regard to strategic development and planning actions.

**X.RESEARCH INSTITUTIONS, EU AND NATIONAL PROJECTS**

**Number of stakeholders per group**

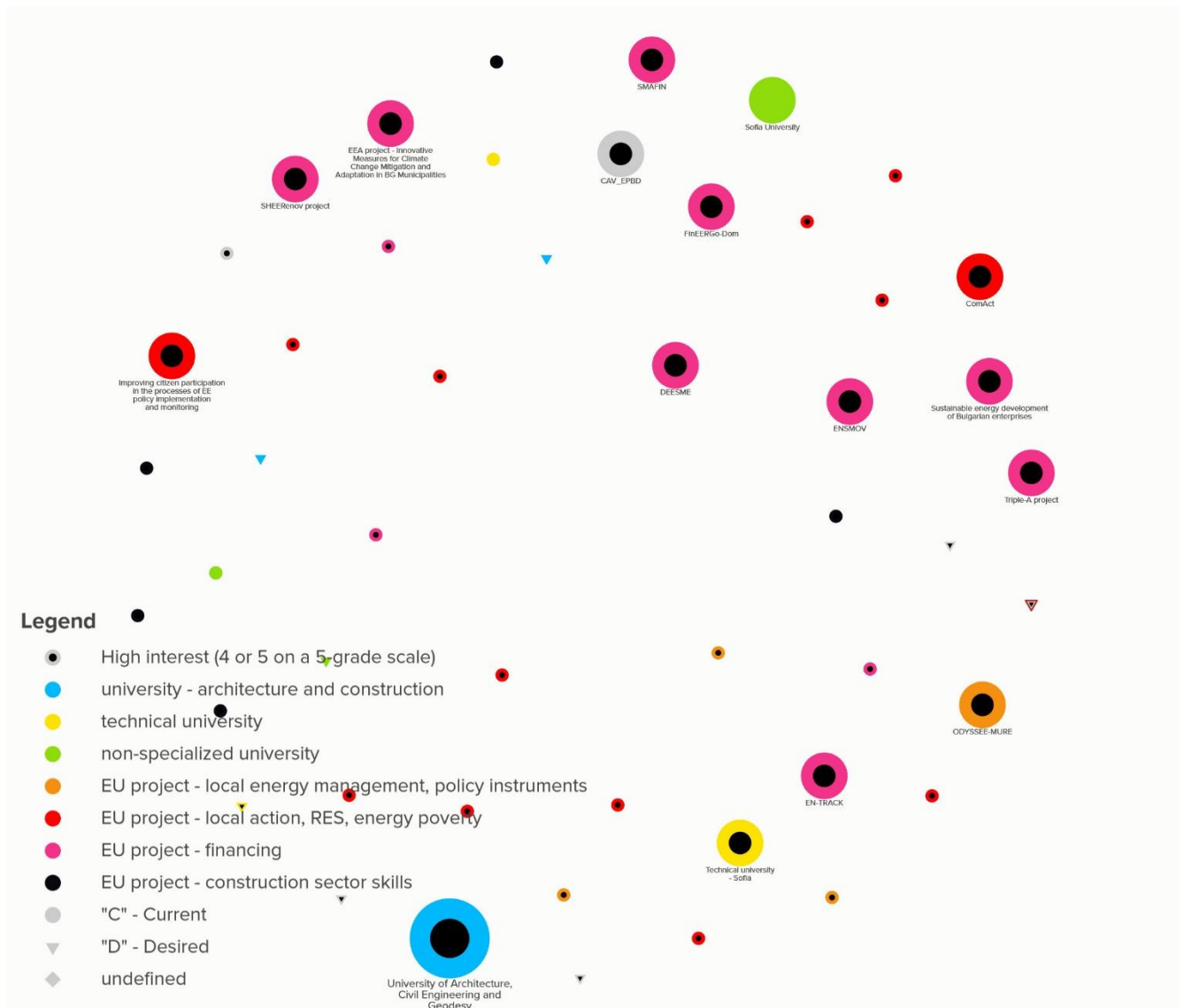
A total of 50 stakeholders are identified as important for the projects’ implementation, with 9 universities grouped according to the relevant specializations. Furthermore, 41 international projects have been included, grouped into 5 sub-categories (in the field of local energy

management, local action, RES, energy poverty, with varying level of influence, however all with potential for cooperation and of significance to the project goals.



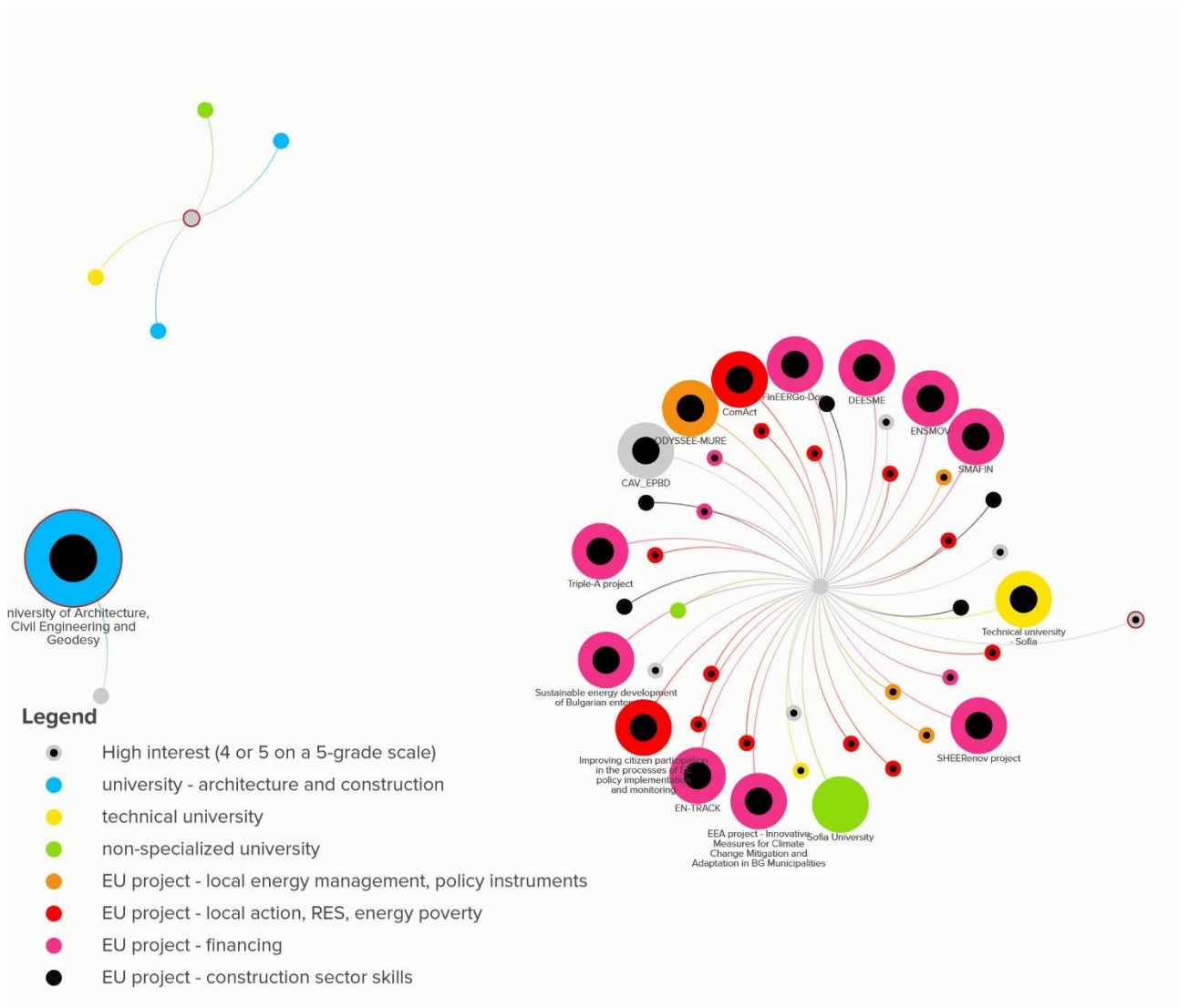
### Influence, interest and attitudes

The R&D community, represented in the identified project stakeholders, namely academia and EU projects, is without a surprise demonstrating high interest (marked by a bullseye) towards the project activities, as the foreseen recommendations for policies and support instruments' reforms involve a serious chunk of R&D, as does the whole process of innovations in energy efficiency technologies. In terms of their level of influence, it can be pointed out that highest level of power over policy making lies with the projects related to energy efficiency policies, the ones that are directly involved into the design of financing schemes, as well as two universities (the partner in BeSMART – UACEG, categorized as a 'collaborator', as well as Sofia university, and the Technical university, also in Sofia) – as they also have the highest influence over capacity building efforts relevant to the project. The remaining universities, although sharing in high interest towards the activities, offer a limited number of courses and/or have not been actively engaged in R&D activities in the priority areas to the project, which is also visible on the picture below (small size, rhomboid shape).



### Type of involvement – influence - interest

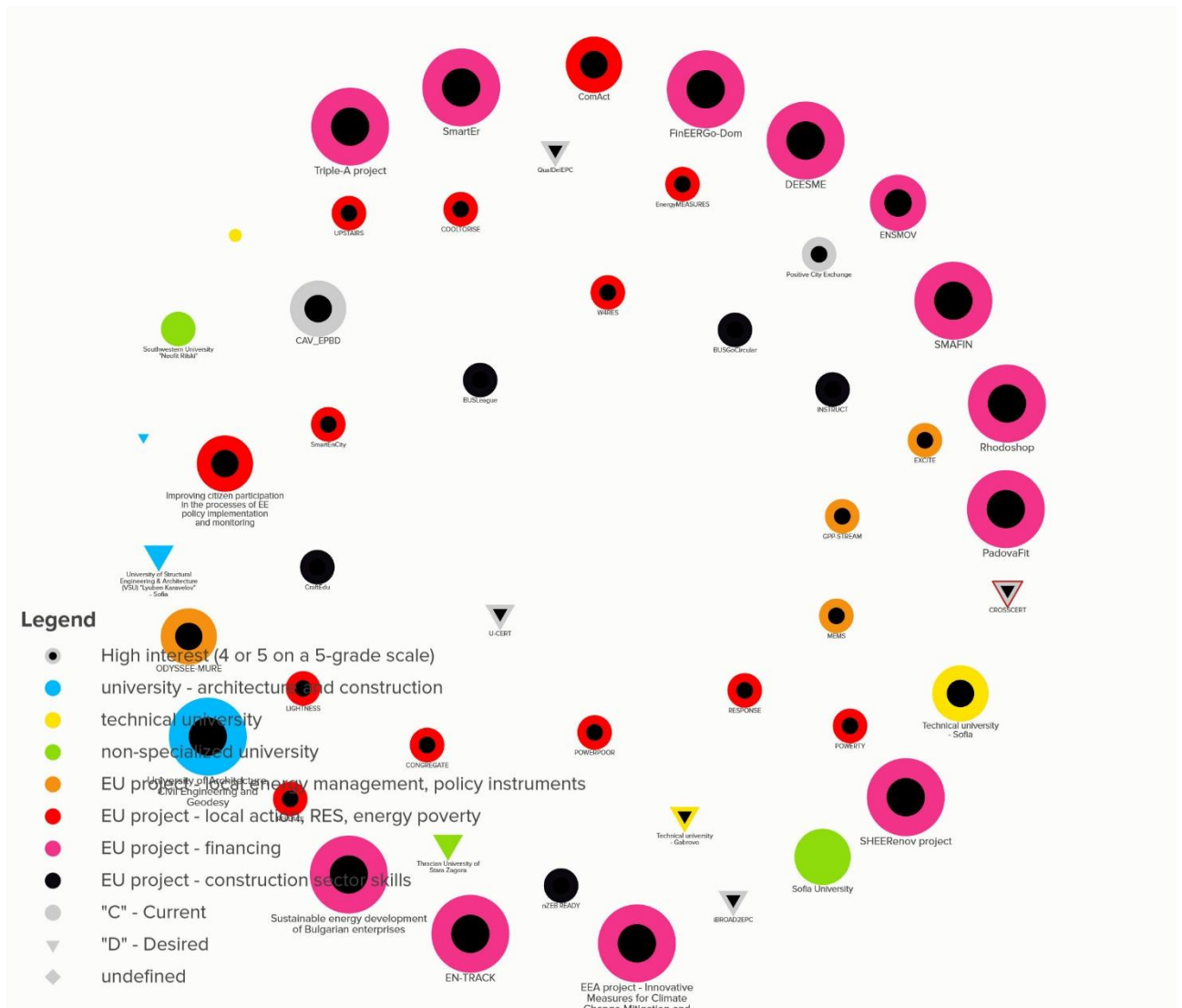
As it can be seen in the visualisation below, UACEG is singled-out as it is a project partner, thus it has been characterized as a project collaborator, and an implementation expert - practically involved in the activities directly. The remaining stakeholders have been grouped according to the current nature of their involvement, evidently, the prior mentioned 4 universities have been categorized as rather 'neutral', which explains the smaller size and separate group. All other stakeholders, represented in the bigger colourful diagram, have been identified as 'supporters' of BeSMART, and are also considered as well-informed and having a high level of expertise, with the financing project naturally having the upper hand (biggest circle shapes).



### Necessity of involvement, attitude and interest to engage

The analysis of the necessity of involvement, attitude and interest to engage shows that, although identified as supporters, the engagement of the non-specialized universities remains to be strengthened (the smaller size is due to the lack of existing collaboration and firm connections established, however the actors' involvement remains necessary and of medium to high priority). While the institutions with a focus on construction and energy efficiency can support the project through the promotion of a positive outlook on renovation effort by evidencing its benefits, they are also crucial for the streamlining of research and innovation activities. It is once again evident that the involvement of the EU projects related to financing and policymaking is highly necessary, as it serves for the exchange of best practices and the work towards shared goals. All analysed stakeholders' involvement is important to the setup of a national framework and for the engagement of participants in the national roundtables, while also contributing to the awareness raising about the project.

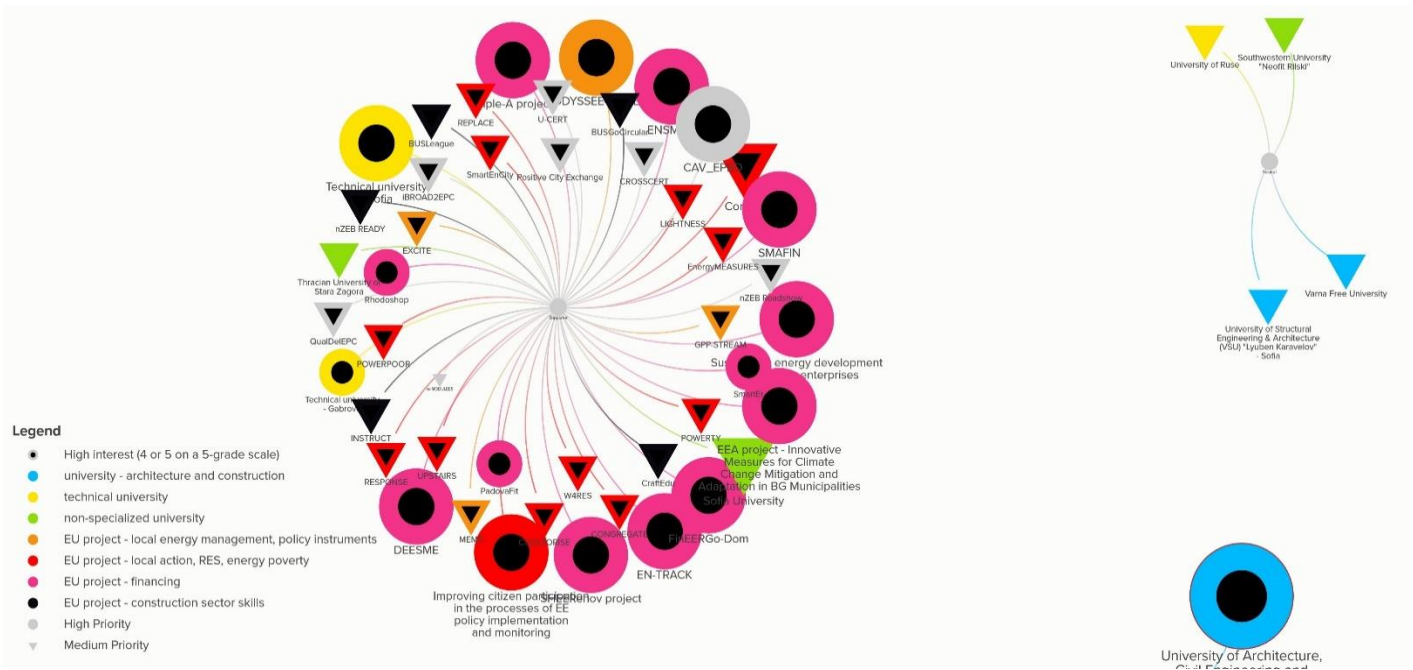




### Influence – priority – role – interest

With the exception of the obvious outlier – the University of Architecture, Civil Engineering and Geodesy, which is also a project partner, the remaining two groups, paired based on the priority of engagement, show similar levels of interest and necessity of involvement in the project activities. And once again it is evident that with highest priority are the EU projects targeting financing mechanisms, energy efficiency policy instruments, with a lower level of priority for building renovation projects, as well as civil engagement and local energy management projects.





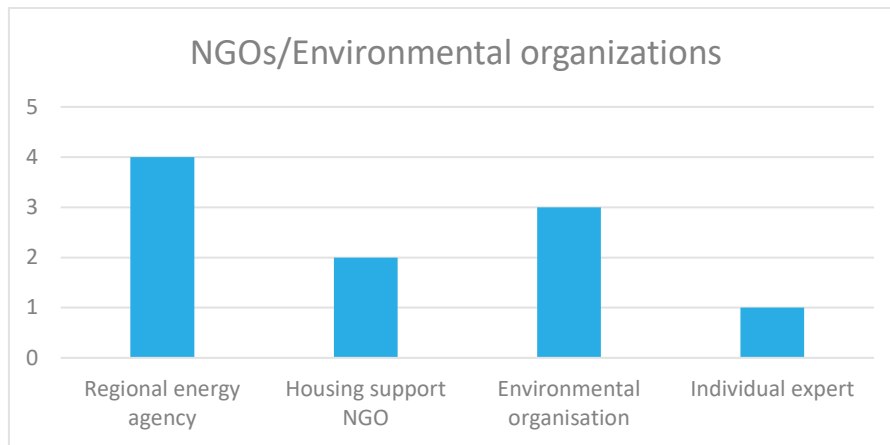
**Conclusion: specific actions needed for the stakeholders’ groups**

Based on the above analysis, it can be concluded that there needs to be specific attention to working with technical universities, as well as the ones offering specializations in finance and R&D. While, engaging with the stakeholders from EU projects, which have been identified as relevant to the core project goals, the already existing connections need to be maintained, with opportunities for knowledge and best practice exchange mainly with the projects active in the field financing of energy efficiency, as well as the energy efficiency policy tools. To ensure the sustainable continuity of the policies and innovations that are to be triggered along and beyond the project’s lifespan, active work with all high priority initiatives is desired.

**XI. GREEN/ENVIRONMENTAL ORGANISATIONS, NGOS**

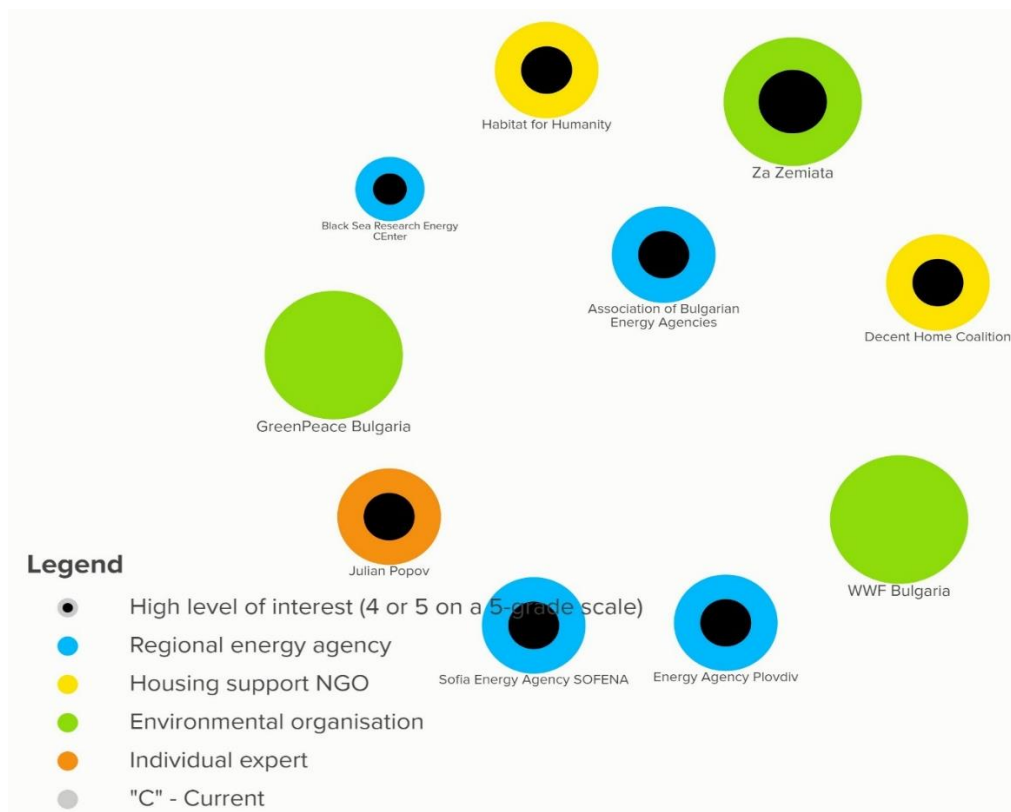
**Number of stakeholders per group**

The selection of non-governmental and environmental organizations to be invited to participate in the forums organized under the BeSMART project is based mainly on their field of expression and previously presented active positions on important topics for the project. A total of 10 stakeholders have been identified, including 4 regional agencies supporting the sustainable energy development of the regions and the cities; two housing organizations supporting better housing conditions development for the low-income groups of the population; 3 green organizations with an environmental focus and active position on climate change-related issues and to energy efficiency policies; and one individual expert with many years of experience in energy efficiency policies in buildings, climate policy and ecology.



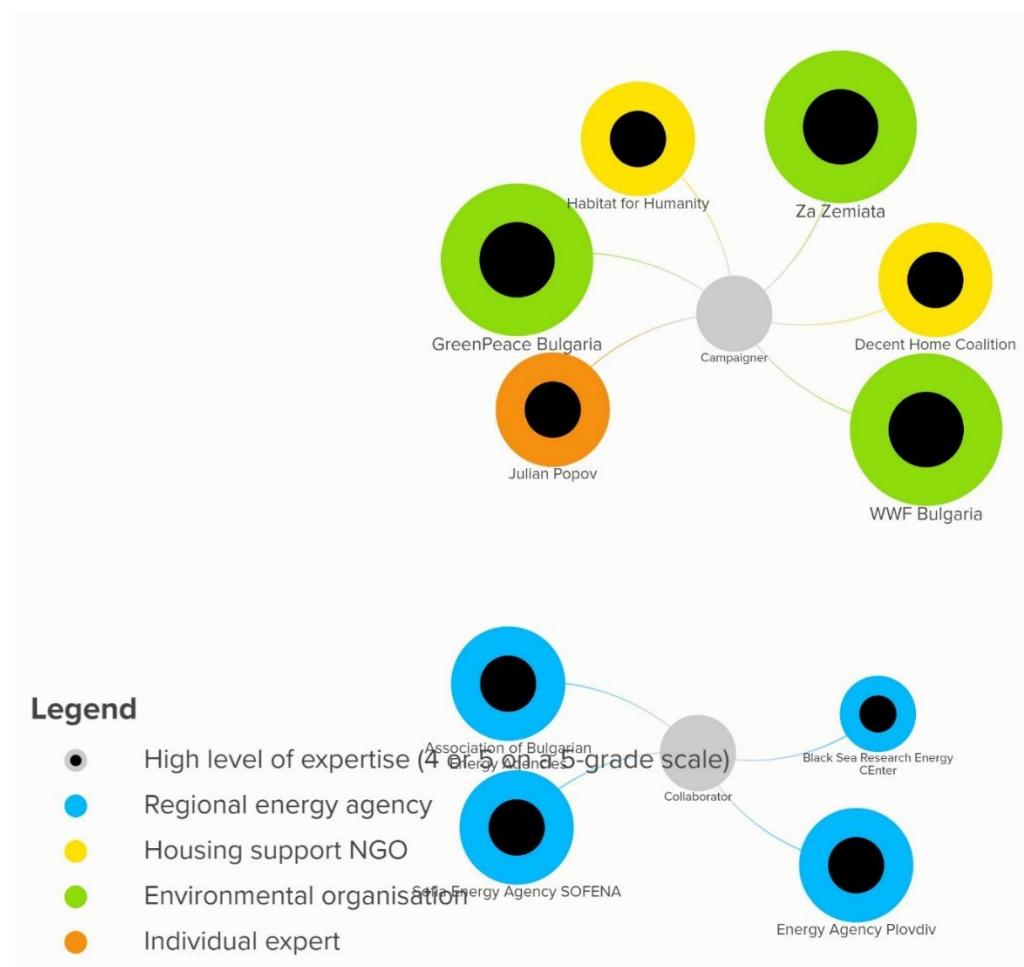
### Influence, interest and attitudes

All identified NGOs and green organization are estimated to have their influence in previous national discussions on the policies related to the energy efficiency in the building sector. All three identified environmental organizations – GreenPeace Bulgaria, Za Zemyata and WWF Bulgaria are evaluated as the organizations with the highest degree of influence (bigger shape size) to the policy makers among the others. The topics important for the project are staying high in the agenda for most of the stakeholders in the group and they have previously demonstrated high interest (bullseye shape) on many occasions. The energy efficiency in the building sector topic is considered not to be of highest interest only for two of the environmental organizations, which activities are covering more broader environmental issues.



**Type of involvement – influence - expertise**

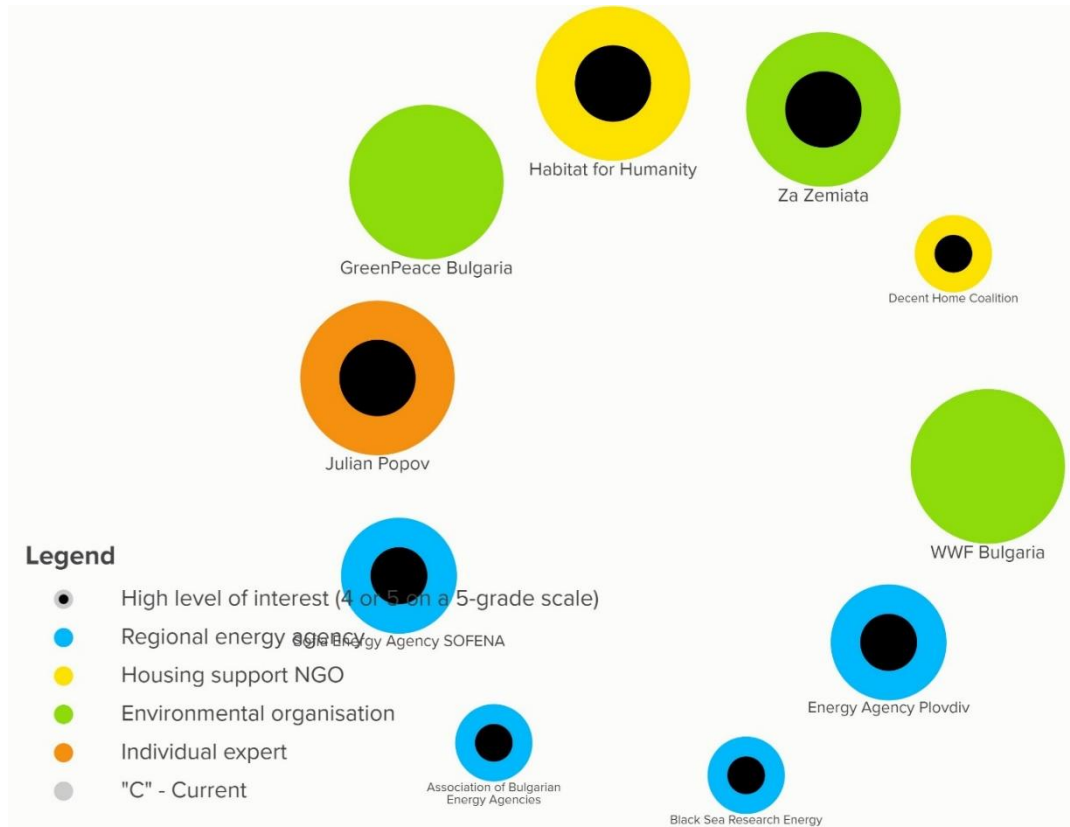
All stakeholders in the group have demonstrated a high level of expertise on the project-related topics as it is evidenced in their published positions or participations in public events and discussions. Based on the type of involvement of these organisations in activities dedicated to influence the policy making process they are divided in two sub-groups – Campaigners and Collaborators. The organisations in the first sub-group typically are organising campaigns in support to or against different important policy issues or decisions and widely demonstrate their position trying to involve as many as possible like-minded organisations and persons. Such campaigners are the identified environmental and housing organisations. The regional agencies selected are classified in the Collaborators sub-group. These organisations more often prefer to work directly with the public authorities presenting expert positions on policy issues.



**Necessity of involvement, attitude and interest to engage**

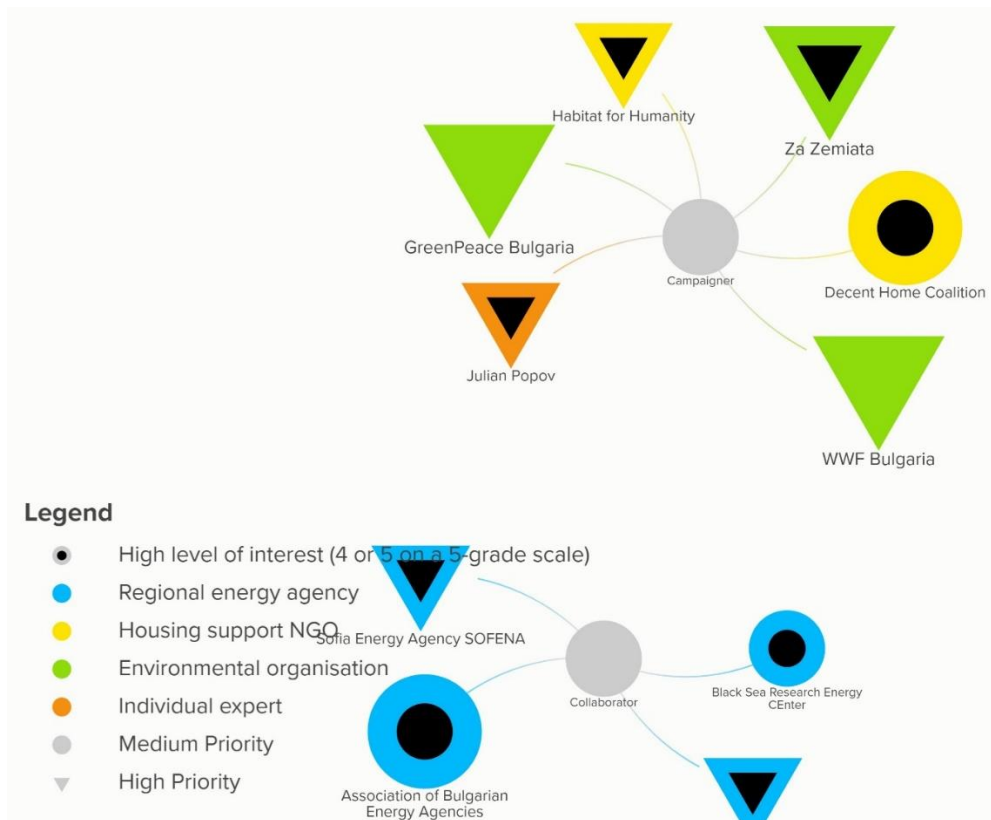
Involvement in the activities organised by BeSMART is evaluated as important for all organisations identified in the group. The organisations classified above as Campaigners are considered to have highest necessity of involvement (bigger shape size) as forums in front of a wide auditory of stakeholders like these organised by the project are among the priority places for expression of their active positions on policy issues. For three of the identified stakeholders the necessity of involvement is combined with their high interest to project-related topics which is a good prerequisite for their active and useful participation in the

discussions. As already mentioned above all identified regional agencies have expressed high interest to the energy efficiency in building policies and although being classified as Collaborators who often use different type of interaction with the public authorities their potential participation is considered as very useful for both sides – the stakeholders and the project.



**Influence – priority – role – interest**

Further analysis taking into account the common dependence of the indicators – influence of the organisations to the policy making, their role in involvement, their interest to topics of the projects but also the degree of priority of the topics in their activities, are presented of on the chart below. For most of the identified organisations it is estimated that the participation in the discussion could be a high priority (triangle shape). In combination with their high interest to the project-related topics and their influence to the policy making process it could be concluded that all stakeholders in the group is important to be involved in the project activities.



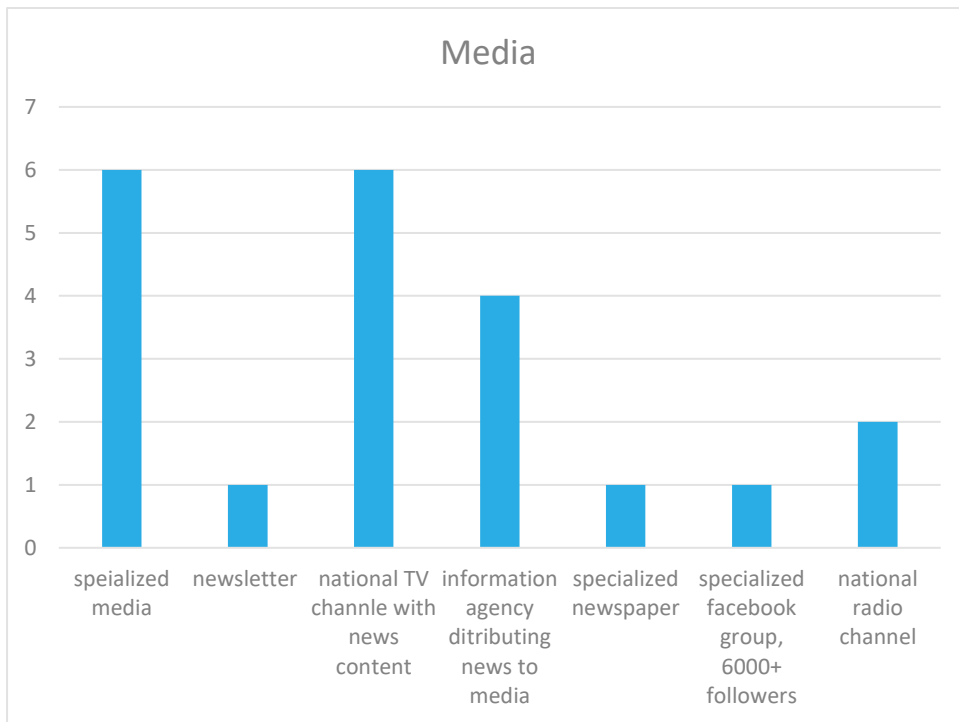
### Conclusion: specific actions needed for the stakeholders' groups

The results from the analyses for the group of the NGOs and the environmental organisations presented so far prove that this is the right selection and the established connections with these stakeholders is a very good prerequisite for collection of very important and valuable positions on the issues under discussion in the project. All stakeholders in the group are well recognised by the policy makers and their positions a taken into account in policy making. All organisations are interested of the topics of discussion and have a high expertise based on their previous public statements and presentations in different events.

## XII. MEDIA

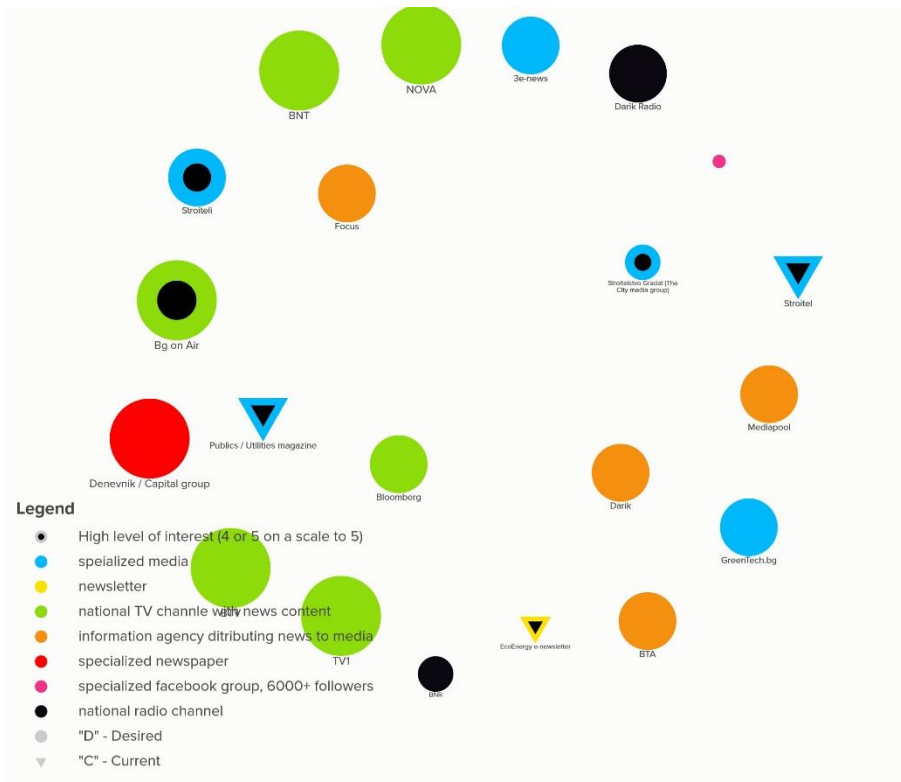
### Number of stakeholders per group

A total of 21 stakeholders are identified as important for the projects' implementation, featuring 6 specialized media outlets, 1 newsletter and specialized newspaper, 6 national TV channels with news content, 4 information agencies and 2 national radio channels. In addition, one active group on Facebook has also been added with nearly 7000 followers and daily content sharing on the topics of energy efficiency and RES investments.



### Influence, interest and attitudes

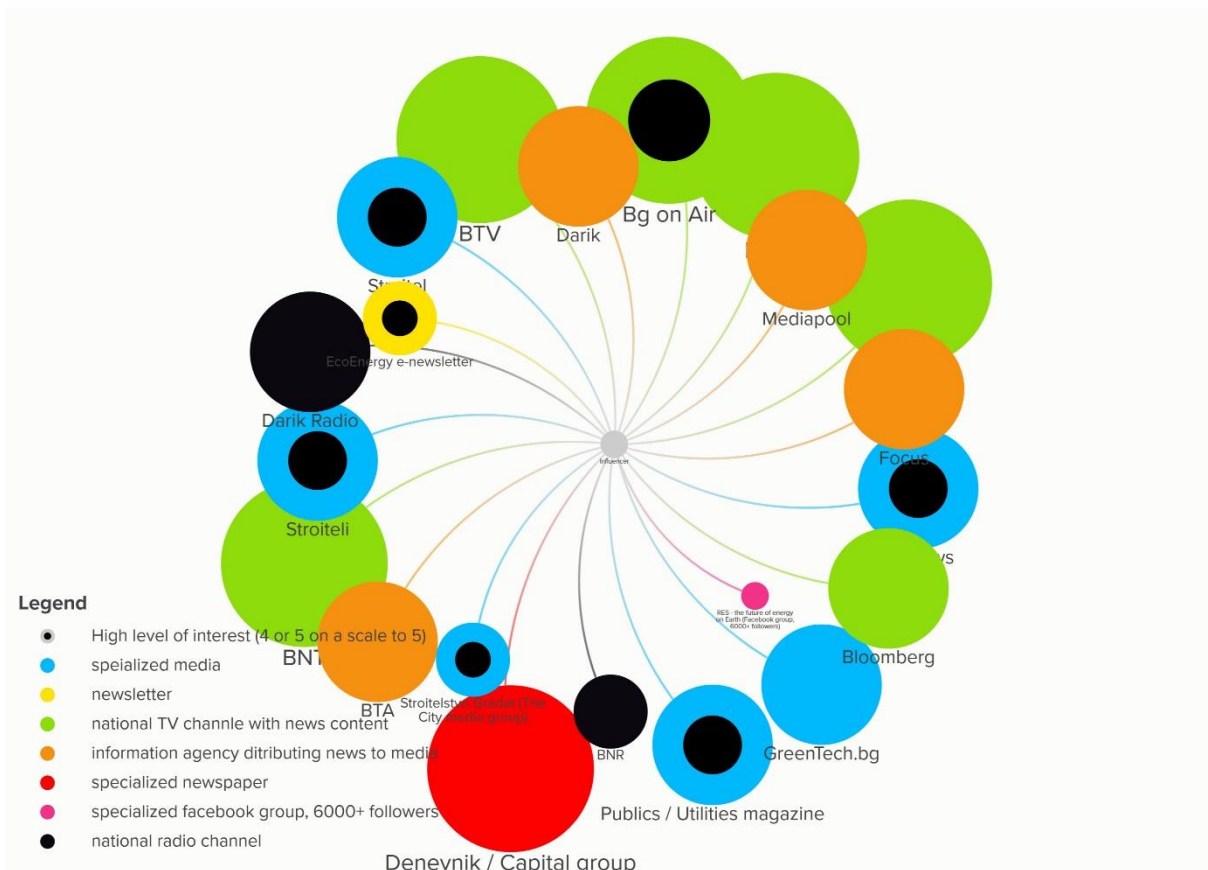
With the aim to engage all stakeholders for the successful knowledge exchange under the project, the most influential and relevant media sources have been identified. This explains the bigger number of specialized media outlets that are crucial for the attraction of expert audiences. Their level of support and interest is comparatively similar (bullseye and rhomboid shape), as for the involvement of nation-wide TV and radio channels – they are still not considered interested (with a few exceptions) and fully supportive (circle shape), although highly influential. This can be accounted for by the lack of nation-wide continuous debate on the subject matters addressed by the project and the fluctuating trajectory of the political discourse in the country, which has been undergoing a long period of turmoil, thus no firm stance in the policy making regarding the subsidy schemes, programs, and financial mechanisms.



**Type of involvement – influence - interest**

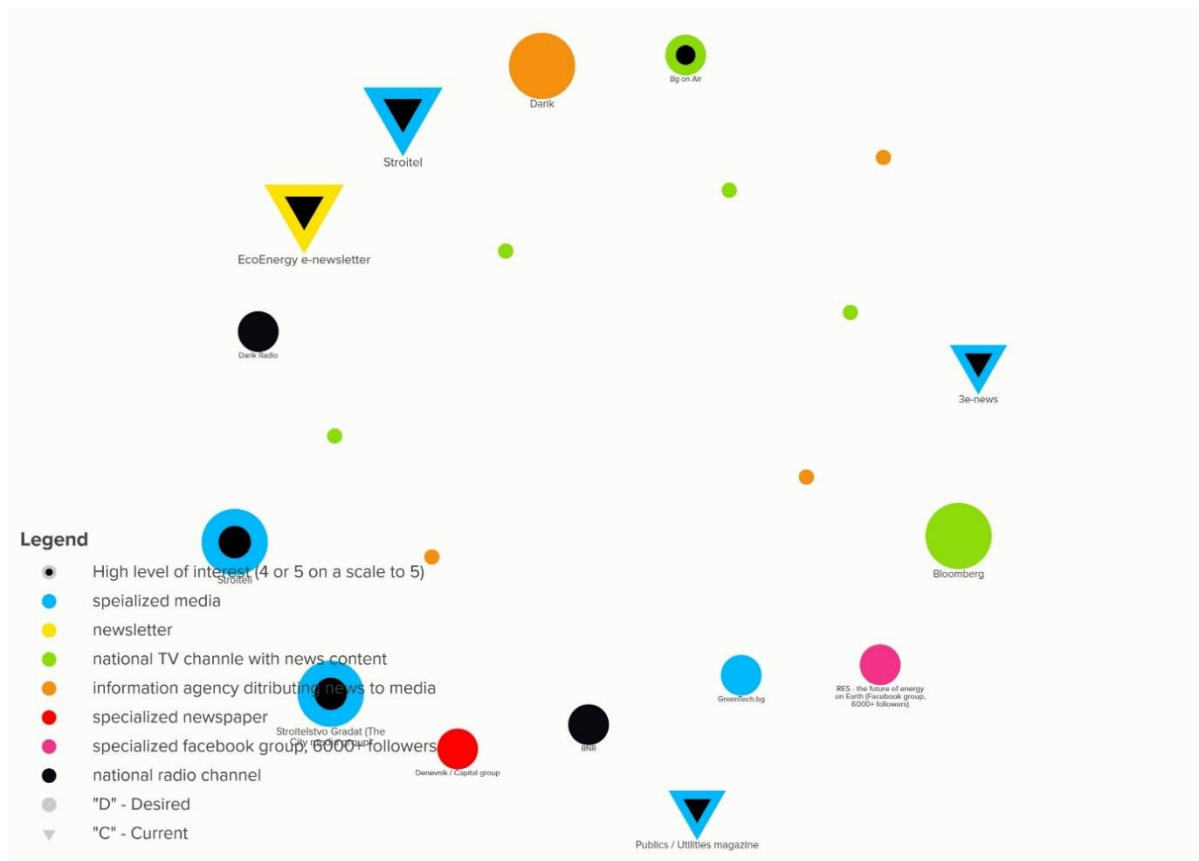
As evident in the visualisation below, all identified media groups are referred to as influencers, with nearly half represented by specialized outlets that are also experts in the subject area and have been supportive on multiple occasions. With few exceptions all stakeholders have been categorized as of high priority, too, as they are important for mainstreaming the project activities and for the engagement of all groups defined in the communication and dissemination strategy. It is evident that the interest (marked by bullseye) of the biggest national TV channels is missing, however a positive development is that the topics are gaining salience via the specialized media sources and the information agencies that are news suppliers to the channels in question, as well as through social media.





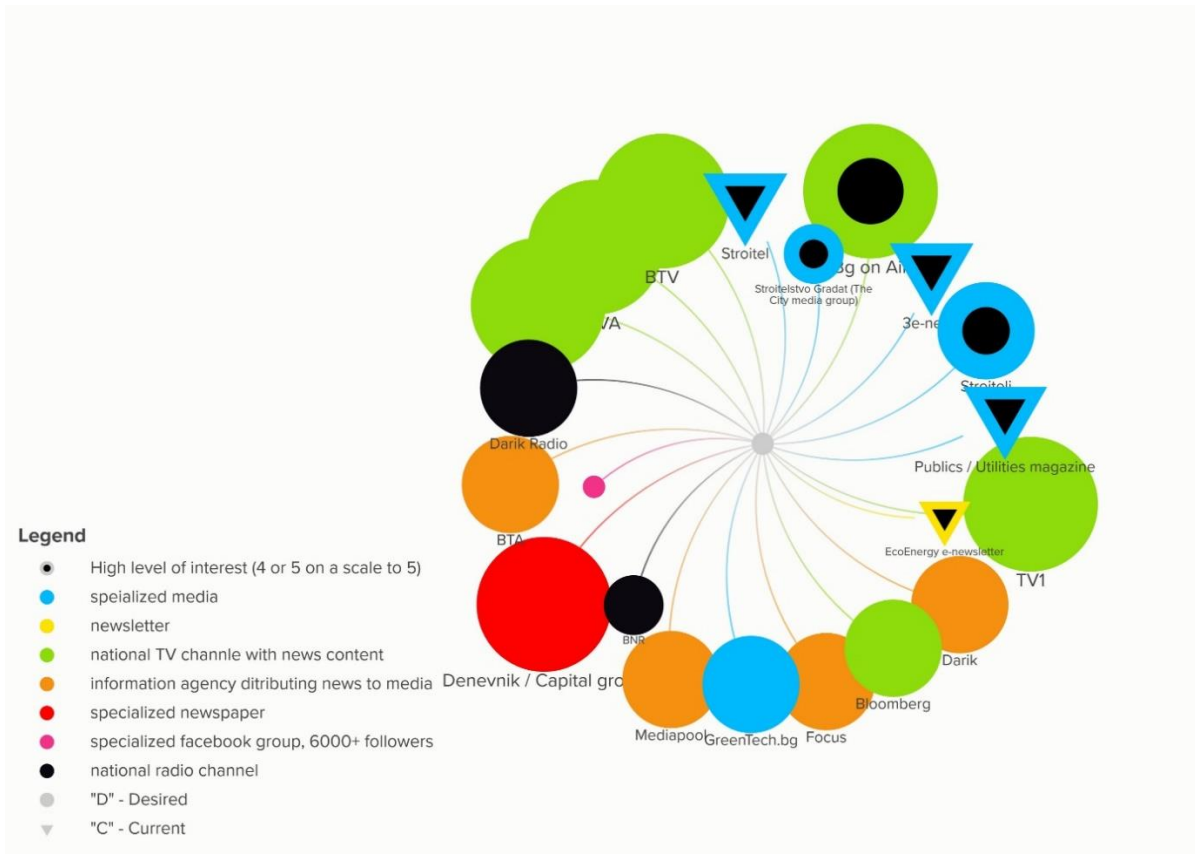
**Necessity of involvement, attitude and interest to engage**

Of utmost importance to spot and polish weak points in the stakeholders’ mapping is the analysis of the necessity of involvement, attitude and interest to engage. Again, while the specialized media, represented by professional news sources and groups have been supportive and interested (rhomboid shape with a bullseye), it is desired that the general TV media sources are attracted (small-sized circle shape to be transformed to rhomboid) as supporters, which can happen individually, as well through press releases, conferences, high-level actors present at policy and business events.



**Influence – priority – role – interest**

This 4-variables approach reveals the priority for involvement of the different stakeholder sub-groups in relation to their interest and value for the project. It can be pointed out that the priority and influence of all identified stakeholders are comparatively similar, with their different level of interest and current support (bullseye and rhomboid shape). However, given the starting point of the project with a very low level of understanding and interest by the public and general media towards the topics covered, it is clear that there needs to be a well-crafted communication strategy with content tailored to the different subtypes of stakeholders, which is also a subject for the detailed elaboration in the engagement plan.



**Conclusion: specific actions needed for the stakeholders’ groups**

Based on the above analysis, it is evident that with the progress of the planned activities under the BeSMART project, the communication channels with already established relations are to be further sought, with more efforts towards attracting the mainstream general media sources – national TV and radio channels, as well as the information agencies that provide news content, as well as further work with the specialized media for the promotion of results. The broader engagement of groups in social networks is also something to pay attention to as the ongoing public debate on such platforms is an important signifier of the topics’ popularity and can provide valuable feedback about the success of the awareness raising and dissemination efforts foreseen by the project.

**CONCLUSION**

The analysis of the stakeholders’ groups important for the successful implementation of the BeSMART project, and in particular, for the process of organisation and conduction of the roundtables on sustainable energy financing and the integration of their outputs in the policy-making process, reveals important tendencies which have to be addressed by the communication and engagement activities. While on the positive side there is significant number of supporters and collaborators which is a good sign for the viability of the proposed

action, there are key challenges which appear under the surface and require further attention in order to secure sustainable outcome and continuation of the project's activities.

Among all target groups, the level of interest towards the topic in discussion is not perceived to be particularly high, and that is also confirmed by even lower levels of expertise demonstrated by all but the core professionals. This is explained with the lack of continuity of the energy efficiency policies in different subject areas and the current policy and public communication landscape, dominated by other topical issues as the COVID-19 crisis, the economic recovery and the political insecurity, resulting in 3 consecutive Parliamentary elections in 2021 only. Even the significant amount of resources which was dedicated for energy efficiency in the National Recovery and Resilience Plan (in all of the 4 drafts open for public) was not sufficient to drive the public attention to the topic, and this is clearly demonstrated by the low levels of interest and involvement by the national general-content media clearly demonstrated by the analysis. To this end, serious efforts have to be invested to intensify the outreach of the project- and topic-related communication and increased the overall insufficient number of influencers active on the topic.

On the other hand, it is perceived as an optimistic sign that in each stakeholders' group, there is a well-defined leadership of one or more organisations, which, in the most cases, are already involved in the project's activities or are actively supporting the discussions. This potential must be fully exploited, as this close circle of collaborators has to be actively engaged – organisation- and communication-wise – throughout the project, which could only be achieved via concrete evidence of results of the discussions being integrated in the national policy developments, and more specifically, in the energy efficiency support schemes. In this regard, there are already some advancements, as in the last draft of the National Recovery and Resilience Plan the grant rates for renovation of multifamily apartment buildings were decreased from 100% to 80%, with the accompanying mechanisms and the involvement of the private financing institutions being proposed for discussion within the next roundtable event.

Last but not least, a vast number of parallel Horizon 2020 projects dealing with specific instruments in support of the energy efficiency policies was identified, as, for the time being, all of them are evaluated as fully supporting the initiative. This fact provides an important organisational and communication asset to the project, as the shared benefits of the collaboration should and would be exploited to increase the outreach of the roundtables events and to showcase operational instruments applied in Bulgaria's own environment, which is a definite advantage for engaging the interest of the identified stakeholders.

