

Energy Solidarity Toolkit



Practical ways for energy
communities to tackle energy poverty



CEES has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No. 101026972.



cees
COMMUNITY ENERGY FOR
ENERGY SOLIDARITY

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communities to tackle energy poverty

Partners:



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Foreword

In 2022, 42 million Europeans could not adequately heat their homes, a 1.6% increase compared to the winter before.¹ Russia's invasion of Ukraine (also in 2022) demonstrated how quickly events in one region can trigger a global energy crisis.

Just one year later (2023), energy demand for cooling shot up as people struggled to cope with the hottest year ever recorded.² Many also suffered terrible impacts of extreme weather events in the form of flooding and fires.

Under current global energy systems, the combination of tight supply and high demand sends prices skyrocketing, making energy more unaffordable for more and more people. Many find themselves facing hard choices of whether to pay energy bills or purchase basic necessities such as food, clothing and medicine. Indeed, rates of **energy poverty** are rising, even in the World's richest countries.

Recent calls for a 'just, clean energy transition', whether through the EU Clean Energy for All Europeans Package³ or the UN Sustainable Development Goal No 7,⁴ challenge all relevant actors to collaborate to radically change our energy future. Critically, **energy communities** (ECs) are increasingly recognised as legal actors in energy markets while citizens are acquiring the right to set up or become members of ECs.

In fact, ECs have come to be defined as a way to bring people together to collectively own renewable energy assets and govern related activities, based on non-commercial and democratic values and dedicated to providing environmental, economic, and social benefits to their members and the wider community.

1. [European Economic and Social Committee \(2022\). Press release. 42 million people in Europe cannot afford to heat their homes.](#)

2. [The Guardian \(2023, 3 January\). Big oil 'fully owned the villain role' in 2023, the hottest year ever recorded](#)

3. https://energy.ec.europa.eu/topics/energy-strategy/clean-energy-all-europeans-package_en

4. <https://sdgs.un.org/goals/goal7>



The CEES Project included representatives from the following organisations: ALLenergy (UK); Coopérnico (Portugal); EnAct (France); enercoop and énergie solidaire (France); Repowering London (UK); REScoop.eu (Belgium); Les 7 vents (France); SNAP (Portugal); University of Birmingham (UK); and ZEZ (Green Energy Cooperative, Croatia).

This has prompted a fundamental shift in thinking, with the concept of **energy solidarity** emerging as a more inclusive approach to achieving a just, clean transition. It implies multiple actors collaborating to overcome energy-related adversity that is experienced by one or more parties. Critically, energy solidarity is inspired by empathy and/or a sense of justice (it may, but does not have to, involve reciprocal obligation).⁵

Over the period 2021-24, **Community Energy for Energy Solidarity (CEES)**⁶ probed how ECs can become a driving force for just and inclusive energy systems at the local level. With the overarching objective of assessing the validity of diverse approaches (or mechanisms, as is used often in this report) for energy solidarity, six partners from four countries piloted different activities in new contexts (see Chapter 5), while additional Partners provided various types of support. As will be demonstrated in case studies and 'tips' peppered throughout this report, adopting new approaches – or adapting proven ones – became a process of trials, errors, failures and ultimately success for CEES partners.

The CEES project delivered many valuable lessons and highlighted the need for even more innovations, interventions and adaptive measures. It also shed light on shortcomings in current efforts. Many existing energy and social policies, for example, create obstacles for ECs. Also, in ongoing energy transition debates, too many voices remain underrepresented and unheard. Such issues threaten to undermine the achievement of a timely, effective and truly just energy and climate transition.

As rising energy demand – directly or indirectly linked to human activity – continues to push up global temperatures, the 'safe operating space for humanity' is shrinking. Being enormously diverse and multi-dimensional, while also the energy actor with the closest ties to energy users, ECs can play an important role in building a sustainable and resilient future that benefits all members of society.

With this Toolkit, CEES hopes to inspire other ECs across Europe – and around the world – to leverage access to clean, affordable energy to empower people, prioritising those most vulnerable to the negative impacts of insufficient energy services. As CEES Partners found, taking the decision to practise energy solidarity is disruptive in many ways, as it forces ECs to re-evaluate their vision and mission, adopt new activities that require the 'on-boarding' of new skill sets, and often to collaborate closely and more strategically with a wider range of entities. It also means rethinking budgets and finding new funding channels. Internally, it triggers a period of tremendous growth for individuals and the EC as a whole.

5. Day, R. and K. Burchell (2023) Energy solidarity in Energy Communities alleviating energy poverty and supporting just energy transitions through solidarity approaches. *Energy, Environment and Societies in Crises: ESA RN12 mid-term and Energy and society Network 6th international joint conference*, 6-8 September 2023, Trento, Italy.

6. CEES has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No. 101026972.

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1 / Introduction

Putting energy solidarity into practice

Experience across the European Union shows that, to date, uptake of programmes aimed at supporting people experiencing energy poverty is low, highlighting the need for better ways to identify who needs help and how to engage with them.

An energy solidarity approach is people-focused, starting with those affected.

Given their close links to both people and local institutions, energy communities (ECs) are well placed to take leadership roles in reconnecting energy users and energy systems.

Understanding energy poverty, broadly and in local contexts

Across Europe (and in other parts of the Western World), political and public awareness of how inadequate access to affordable energy undermines individual and societal well-being is on the rise. Particularly since Russia's invasion of Ukraine (2022) triggered a global energy crisis that disrupted supply and demand chains, drove price spikes and left millions more people struggling to cope with energy bills.

Foundational research (in the 1970s) identified three underlying causes of **energy poverty**: low energy performance of buildings and appliances; low incomes; and high energy prices. The result is that households spend a high proportion of disposable income on energy. Even so, they are often unable to adequately heat or cool their homes, or forgo other necessities such as food, clothing or even medicine in order to continue paying energy bills.⁷

Over the years, greater recognition of other factors that influence vulnerability to energy poverty has emerged, such as the makeup of a given household and their specific energy needs, as well as contextual aspects such as the local climate (e.g. extreme cold in winter or extreme heat in summer).

In reality, energy poverty is typically one aspect of a complex and multidimensional situation. The root causes and ultimate impacts can vary widely from one context to another, at regional, community or even household levels.⁸ As such, recognising situations of energy poverty and how it manifests itself in a given community may be extremely challenging. In turn, actions to intervene need to be carefully tailored.

7. https://energy.ec.europa.eu/topics/markets-and-consumers/energy-consumer-rights/energy-poverty_en

8. https://energy-poverty.ec.europa.eu/system/files/2022-06/EPAH%20handbook_introduction.pdf



While language is evolving, the term 'energy poverty' remains widely used to describe situations in which an individual or household cannot afford 'enough energy'.

In recent directives and communications, the EU defines energy poverty as, **"the inability of a person or family to afford basic energy services such as heating, cooling, lighting, mobility and power to guarantee a basic standard of living."**⁹

Other entities include other criteria. Notably, while some Member States have set national definitions that underpin policy and financial frameworks, others do not yet fully recognise energy poverty as a systemic issue requiring justice-oriented intervention.

CEES has sought to refine a definition that reflects the contextual and situational aspects, as well as their impacts on all members of a given household. It recognises that energy poverty is experienced as a deeply personal matter, which many households try to self-manage by reducing consumption, cutting other expenses, or developing various coping mechanisms.

ENERGY POVERTY is the situation in which households are unable to access affordable energy services (such as adequate warmth, cooling, lighting, and energy to power appliances) that underpin elements of human flourishing (such as health and well-being, relationships, social inclusion, employment, recreation and education).¹⁰

With this definition, CEES acknowledges some of the most pressing negative impacts associated with energy poverty: poor physical and mental health outcomes; challenges within family and other relationships, and broader social exclusion; and limitations on access to employment, recreation and education opportunities. Ultimately, CEES identifies an additional driving force behind high and sustained levels of energy poverty or energy injustices: underrepresentation of vulnerable groups in energy decision making.

9. https://energy.ec.europa.eu/topics/markets-and-consumers/energy-consumer-rights/energy-poverty_en

10. Day, Rosie, Gordon Walker and Neil Simcock (2016) [Conceptualising energy use and energy poverty using a capabilities framework](#), *Energy Policy*, 93: 255–264.



An evolving role for energy communities

Generally, **energy communities** (ECs) embody a collaborative, democratic approach to energy that empowers communities, fosters sustainability, and promotes a more inclusive and responsible energy landscape. By bringing people together to collectively own renewable energy assets and govern related activities, ECs can empower individuals and communities, boost local economies, ignite social cohesion and ensure social acceptance of the clean energy transition.

An **ENERGY COMMUNITY** (EC) generally refers to a legal entity that sets up citizen-driven projects, based on democratic and cooperative values, to promote the transition towards energy systems that are more sustainable, efficient and socially fair.

The launch (in 2019) of the [Clean Energy for All Europeans Package](#) officially recognised ECs as legal actors in the energy market. In turn, all EU citizens acquired the right to set up or become a member of an EC. The Package offered a formal definition based on ECs carrying out three interrelated activities:

- develop and operate local and cooperative production and storage infrastructure for renewable energy;
- sell renewable energy to households and businesses; and
- provide energy, energy efficiency and energy poverty services.

A key feature of ECs is that – in sharp contrast to traditional energy suppliers – rather than seeking

solely to generate financial profit from the supply and sale of energy services, they aim to provide a broader range of services in ways that also deliver local environmental, economic and social benefits for members, shareholders and communities. Shaped by – and responsive to – the needs of communities they serve and driven by collective principles, ECs replace the supplier-consumer relationship with approaches that promote greater interaction and solidarity among members around energy-related issues.

Because of their underlying principles and the fact that they are often well-established within their local areas, ECs are well-placed to play a pivotal role on the journey towards more just energy systems. As demonstrated through a CEES Survey (see Box 1), a growing number of ECs are keen to raise awareness of energy poverty and engage in, or indeed lead, actions to tackle it through solutions tailored to the specific needs and challenges of their communities. In reality, few currently feel equipped – in terms of experience, expertise or resources – to implement projects.



Box 1. CEES Survey shows strong interest but weak action by ECs

As an early action, CEES surveyed existing ECs to better understand how many are actively taking action against energy poverty. The results were insightful on various levels. To capture a broad spectrum of ECs working in diverse contexts, the online survey was offered in Croatian, Dutch, English, French, German, Greek, Italian, Polish, Portuguese and Spanish. Across 14 European countries, 77 ECs gave responses eligible for analysis.

The majority (57%) identified energy poverty as a significant or very significant problem in their area. Yet relatively few were taking significant action to tackle it.

Why are so few ECs tackling energy poverty?

The CEES Survey revealed multiple barriers to action. Almost half (48%) of respondents selected 'lack of householder awareness about available support' as a challenge, suggesting that ECs need to find better ways to communicate with target groups. Two additional barriers reflected characteristics of householders: notably, a lack of capacity to engage (40% of respondents) and reluctance to seek help due to stigma (38%). Language and disability or health issues among householders also came to the fore.

On the part of ECs, for 48 (77% of responses) of the ECs analysed, a lack of funding was the main barrier to doing more, followed by lack of staff (69%) and lack of knowledge and expertise (48%). A smaller number (21%) identified legislative or regulatory hurdles.

In relation to lack of funding, the public sector was identified as the most important source for 20 of the 50 ECs responding (40%). Several noted that the short-term nature of grants and high competition for limited funds make it difficult to plan and execute effective, long-term schemes. In turn, lack of funding limits the ability to engage staff. Just 9% of ECs analysed had more than

five full-time employees working on energy poverty, meaning the vast majority have limited capacity.

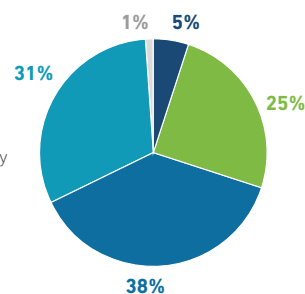
Some 20 ECs (of 49) said that current policy and regulatory frameworks impede their efforts. Examples include a lack of legislation defining energy poverty; General Data Protection Regulation (GDPR) hindering access to vulnerable energy consumers; and policy intermediaries, such as social workers, acting as gatekeepers.

To date, truly transformative interventions are rare

Providing free information and advice is the most common mechanism by which ECs tackle energy poverty. The most popular topics are recommending behaviour change for energy efficiency (80% of respondents), helping people understand their energy bills (75%) and offering information on renewable energy sources (70%).

At ~30%, the number of ECs currently taking significant action against energy poverty is quite low

- Work on energy poverty is our main or only activity
- We carry out significant work on energy poverty
- We work on energy poverty a little
- We do not currently work on energy poverty
- Don't know



What direct assistance do ECs provide to the energy poor?

Type of assistance	No. of responses
Investigate energy efficiency solutions for households	27
Apply for grants for energy efficiency measures	22
Referrals to other sources of support	22
Compare tariffs and switch suppliers	20
Choose energy efficient appliances	17
Advocate with suppliers or ombudsmen	12
Referrals to other sources	11
Apply for benefits	10
Digital assistance	10



Only 37 ECs answered a question regarding specific interventions to help reduce energy costs and/or improve energy services to make homes more comfortable. The majority (67%) help people implement energy efficiency solutions. More than half (55%) also help households apply for grants for energy efficiency measures and provide referrals to other sources of support.

Only 20 respondents replied to questions related to large-scale interventions – which are most likely to deliver significant benefits, but typically carry high costs. Installing home-based systems for renewable electricity generation was the most

popular approach (65% of respondents). Two ECs fit energy storage devices or batteries and one replaces old boilers with more efficient models.

Offering financial assistance is a common mechanism by which many governments provide temporary relief to households, but it is rarely practiced by ECs. Just seven respondents help clear debts linked to energy consumption, while four use fuel vouchers and two subsidise membership fees. One EC provides grants (up to €2 910) to partially cover larger intervention projects.

To develop targeted and effective interventions, all actors – including ECs – need a solid understanding of how energy poverty manifests itself in the context(s) in which they operate. They may even find it useful to further refine wording and definitions to better reflect the multiple important roles that energy plays in the daily lives of the communities they serve and recognise the problems that arise from its lack.

Energy solidarity to tackle energy poverty

In recent years, the concept of **energy solidarity** has emerged as a form of collective action to address a range of energy injustices. As part of the CEES project, researchers from the University of Birmingham investigated relevant academic theory and produced the following definition of energy solidarity.

ENERGY SOLIDARITY is present when actors willingly work in ways that align, on a shared goal of overcoming energy-related adversity that is experienced by one or more of the parties. Energy solidarity is inspired by empathy and/or a sense of justice, and may, but does not have to, involve reciprocal obligation. Stronger solidarity involves a more sustained commitment, and/or a willingness to incur a higher personal cost in pursuit of the shared goal.

(Day and Burchell, 2023)¹¹

ECs may take up energy solidarity measures on their own or, more often, in partnership with other people and/or actors. As the practice of energy solidarity is relatively new for many ECs, building up local,



regional, national and international 'communities of practice' can foster mutual support, lead to efficiencies in applying best practices and stimulate uptake of new approaches that prove effective in certain contexts or with certain groups.

In putting energy solidarity principles into practice, ECs may directly assist households in energy poverty and/or work to build the capacity of other actors who already have close connections with people facing related vulnerabilities. Both approaches are probed in more detail in Chapter 4 of the Toolkit.

To apply energy solidarity effectively, it is critical that everyone involved:

- **Understand the causes of energy poverty** and the lives of people coping with energy poverty. ECs may even find it useful to further refine wording and definitions to better reflect the multiple important roles that energy plays in the daily lives of the communities they serve and recognise the problems that arise from its lack.

11. Day, R. and K. Burchell (2023) Energy solidarity in Energy Communities alleviating energy poverty and supporting just energy transitions through solidarity approaches. *Energy, Environment and Societies in Crises: ESA RN12 mid-term and Energy and society Network 6th international joint conference*, 6-8 September 2023, Trento, Italy.

- **Acquire the skills needed to engage with people** experiencing situations of energy poverty respectfully and without judgement.
- **Recognise the importance of working together**, so people experiencing such situations become 'active agents' in finding and implementing solutions (rather than passive recipients of charity).
- **Create and work with local networks** of donors, volunteers and other professional and voluntary organisations to embed energy solidarity -- in a holistic manner -- into efforts to assist households in situations of vulnerability.
- **Maximise the potential for practicing energy solidarity** to generate other local benefits (e.g. lower energy bills and greater thermal comfort in dwellings; using EC profits to create community funds that finance other needs; training and employment opportunities for local young people).

ECs aiming to tackle energy poverty may find it necessary to consider additional aspects, such as local energy sources, the type and state of dwellings, and cultural norms. Ideally, they should take into account all factors that influence what energy a given household needs and whether they can acquire that level of supply at a cost that does not stress their household budget. Paying energy bills, for example, should not mean being unable to afford other necessities such as food, medicines or education.

The CEES Energy Solidarity Toolkit

Over the period 2021–24, CEES Partners committed to pilot a range of energy solidarity mechanisms from delivering 'Cozy Kits' to hosting Energy Cafés and carrying out renovations for low-income households. In parallel, several tried ways to raise funds to cover the direct and indirect resources needed to carry out such activities.

All CEES Partners found that identifying and engaging with people in situations of energy vulnerability was particularly challenging. Often, they needed to revert to first identifying and engaging with other organisations that had built up trusting relationships linked to other vulnerabilities.

The experience of CEES Partners emphasises that practicing energy solidarity is an evolving process, full of trials, errors, failures and learning that eventually lead to success. Indeed, ECs embarking on this new journey should anticipate growing and changing – and perhaps even being transformed – by the process.

The CEES Energy Solidarity Toolkit describes mechanisms that Partners put into practice and includes both tips and cautions to keep in mind. Critically, the first chapter covers elements that need to be put in place within the EC before it is truly ready to be a leader in energy solidarity, particularly the 'on-boarding' of soft skills to complement the technical and financial capacities typically in place. ECs need to bring their understanding of energy systems to communities in a way that engages citizens in a thoughtful diagnosis of relevant issues within local contexts. They need to be ready to listen while citizens describe their the most pressing needs and then collaborate to select the most effective solutions.

CEES Partners hope that this Toolkit will inspire other ECs across Europe (and around the world) to fully leverage their unique capacities to deliver social impact through energy solidarity.

ADDITIONAL RESOURCES:

- [The Greens/EFA Energy Poverty Handbook](#)
- [EPOV: The multiple impacts of energy poverty and the benefits of addressing it](#)
- [7 practical steps to energy poverty diagnosis: Energy Poverty Advisory Hub learning guide](#)
- [Introduction to the Energy Poverty Advisory Hub \(EPAH\) Handbooks: A Guide to Understanding and Addressing Energy Poverty](#)



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2/ Getting started

Aligning community needs and EC capacity

A decision to practise energy solidarity will fundamentally alter many things about a given energy community (EC) – from who it provides services to and the kind of services it will offer to the entities it collaborates with.

As CEES Partners experienced, it will require different resources, in terms of materials and equipment, the skills of staff and volunteers, and financing. Often, it will require more of all such resources.

This first chapter of the Energy Solidarity Toolkit aims to give an overview of aspects to consider up front.

New roles require different approaches

Taking steps to lift people out of energy poverty may involve a range of technical measures. But before such interventions can be implemented, ECs need to identify and engage with vulnerable people. Relying solely on technically oriented staff to fulfill this role – without providing additional training or upskilling – can be problematic.

Ultimately, putting energy solidarity principles into action requires integrating technical and social processes. ECs are typically experts in the first but may lack specific training in the 'soft skills' needed to interact effectively with vulnerable households.



Different clients with different needs

At present, according to various studies, most EC members are quite energy-savvy. They join ECs because they are keen to participate in the clean energy transition and feel knowledgeable enough to make informed decisions and investments.

In sharp contrast, literature on energy poverty emphasises the extent to which people in such situations are likely to: be facing multiple vulnerabilities; feel a sense of shame or stigma with respect to their situation and home; and to have had negative experiences when engaging with government agencies or other organisations.

In fact, lack of access to adequate, affordable energy is typically just one element of a complex web that 'traps' low-income households. Inadequate energy may be the cause of mould and damp that undermines their health. Distress with respect to the condition of their home may trigger depression and self-isolation, eroding their mental well-being. Economic hardship is often linked to inadequate nutrition, inability to upgrade or maintain dwellings, and low levels of attainment in education, which limit employment opportunities. In some cases, other factors such as disability or poor physical/mental health also come into play.



Collectively, these factors can lead to a sense of shame on the part of vulnerable people and/or a degree of stigma within society – whether perceived or real. In turn, many will self-isolate and avoid social interaction; some may live in severe deprivation and exhibit signs of desperation.

A second consideration is that many vulnerable people have legitimate reasons to avoid or even mistrust government agencies or other authorities or civil society organisations (CSOs). Or, in general, to be wary of new offers from unknown people. A single parent living in a degraded home, for



TIP FROM CEES

A FEW WORDS OF CAUTION FOR PIONEERS IN ENERGY SOLIDARITY

ECs eager to implement energy solidarity mechanisms should be aware of several overarching challenges they are likely to encounter.

Most notably, to date, legal and regulatory frameworks related to both energy poverty and ECs remain incomplete or incoherent in many EU Member States. This can lead to a wide range of obstacles, such as difficulty to access financing and other forms of support.

More broadly, failure by Member States to establish supportive policies and frameworks jeopardises the development of an EC movement and its ability to engage citizens in delivering just transition objectives in a timely manner.

In turn, low general awareness of energy poverty – and of the substantial resources required to address it – may make it difficult to convince EC members to integrate energy solidarity into a given EC's core mission.

As CEES Partners quickly discovered, even when the will to help people is strong and sufficient resources are in place, progress can be slow. Identifying people in situations of energy vulnerability may take quite some time; building trust and convincing them to engage is likely to take even more. Often, 'the way in' is through other people and organisations they already know and trust, which implies investing time and effort in building partnership networks.

In the near term, ECs need to invest substantial time in understanding the context in which they operate – and possibly in educating policy makers and other actors while also advocating for action.

“Many poor people believe more in buying a lottery ticket on Friday the 13th than that the government will do anything to help them.”

Franck Billeau, Founder, Reseau Eco-Habitat, France

example, may fear that his or her children will be removed. An elderly person who falls behind on energy bills, in part because heating the now oversized family home is no longer affordable on a reduced pension, may worry about being forcefully relocated to a retirement home. In rural areas, government agencies may be under-resourced and known to be slow to respond to requests, thus seeming disinterested, unhelpful or even dismissive.



TIP FROM CEES RESPECTING PRIVACY, UPHOLDING PRIVACY LAWS

As society became increasingly digital and data collection widespread, the EU recognised the need to protect the privacy of citizens. In 2016, it established the General Data Protection Regulation (GDPR) as an important component of EU privacy law and human rights law, in particular Article 8 of the Charter of Fundamental Rights of the European Union.

Data privacy rules are strict for good reason: they protect people from misuse of data and from fraud.

CEES applauds the EU for establishing regulations that prioritise personal privacy over unrestrained data collection. ECs need to educate themselves on how to comply, as well as how restrictions may make it harder to identify and engage with people in energy vulnerability. While lifting people out of energy poverty is a priority in the just, clean energy transition, data protection may make it more difficult for ECs to deliver energy solidarity measures.

An example CEES Partners encountered was the desire to measure the degree to which interventions – such as delivering Cosy Kits or conducting Energy Advice Home Visits – would reduce energy consumption, related CO₂ emissions and energy bills.

In fact, as most CEES Partners are not energy suppliers, there is no legitimate reason to ask households receiving such support to show their energy bills. Similarly, if ECs carry out an energy renovation project, having data from the home's smart meter could be very helpful. But such data are available only to the household, their energy supplier and network operators.

Regulations aside, ECs need to respect that, in general, people are very wary about sharing personal information. Those in vulnerable situations or from particular ethnic or cultural groups may be even more reticent. This reinforces the importance of constantly seeking to build trust and be attuned to concerns people may – or may not – express.

In turn, ECs must take seriously their own obligation to have in place secure data storage and good participant safeguarding protocols.

Data privacy laws may also constrain what information can be collected and used to evaluate energy solidarity measures. ECs should take this into account at the beginning and be sure they develop other effective evaluation options.



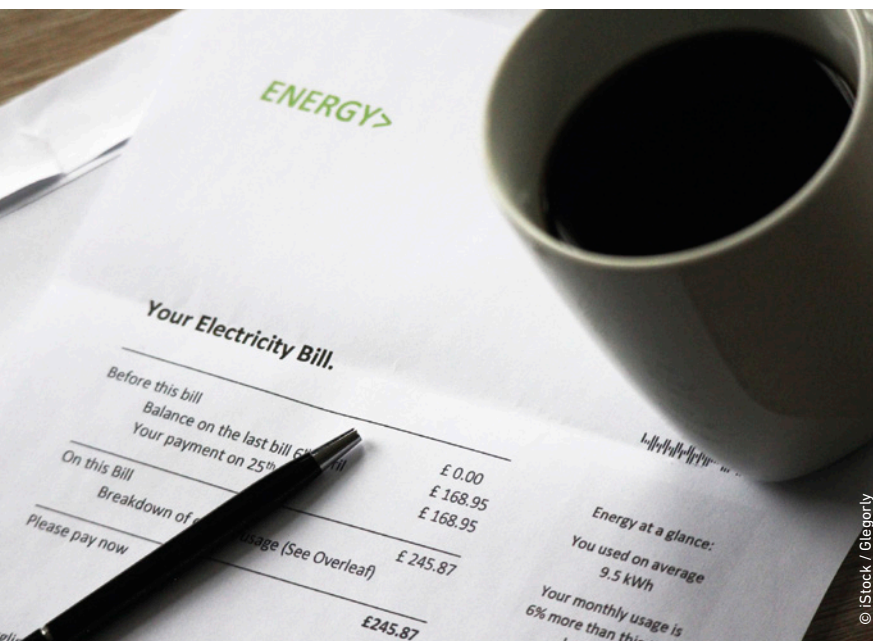
ECs must thus begin with engagements that seek to build trust, rather than immediately proposing services or works, or even asking people for something – including basic personal information typically needed to evaluate their living situations and/or eligibility for support. Beyond avoiding judgment or blame, anyone in contact with energy-poor households should actively express empathy and show support. For example, they should carefully explain why they are asking for any personal information and be clear about who will have access to it and for what reasons. A key role for ECs can be to try to simplify the complicated and burdensome processes and systems often linked to assistance schemes, or to patiently guide people through them.

In turn, ECs must consistently act in ways that are trustworthy and respectful. This implies also being conscious of not over-promising and of following through, in a timely manner, on what they say they will do.

Finally, ECs should make sure each household can easily reach them if questions arise or more information is needed. Ideally, each household would have a single point of contact and mechanisms within the EC would be set up to share information as needed. Households should also be made aware of the mechanisms by which they could file a complaint if dissatisfied with the interactions with a representative of the EC.

Participant safeguarding refers to the need, particularly when carrying out research or doing interventions, to protect a person's health, well-being and right to live in safety, free from harm, abuse and neglect.¹² This implies engaging in safe and inclusive ways, respecting the person's

12. <https://user-research.education.gov.uk/standards-and-principles/participant-safeguarding/>



right to autonomy and being prepared to respond appropriately if a person expresses feeling unsafe for any reason.

The UK Department of Education offers some practical advice about participant safeguarding, including three risks to be aware of and plan for:

- The risk of causing the participant and others harm in research settings. For example: if a participant is asked to discuss a traumatic topic and becomes upset.
- The risk of harm being disclosed or identified in research settings. For example: if a young child reveals that they are left home alone for long periods of time.
- Direct risks posed by health conditions. For example: exposing participants to an increased chance of catching COVID.

A comprehensive participant safeguarding policy should cover all individuals involved – i.e. both members of households and EC staff and volunteers. It may have sub-sections that vary for different target groups (e.g. children, adults, persons with disabilities). It should align with legal obligations relevant to the activities and the context, and clearly identify who holds responsibility for ensuring the protocols are followed. Finally, it should set out appropriate referral pathways.



TIP FROM ENERCOOP BE AWARE OF LIMITATIONS

As a commercial enterprise that buys and sells energy, Enercoop has a large customer service department with well-established protocols for many aspects of its activities.

This supplier status, however, also constrains what personal information customer service representatives can legally or easily obtain from clients – even if the aim is to determine whether they are in a situation of energy precarity and thus eligible for support.

The legal frameworks respect that clients may be uncomfortable providing information about their financial resources, health, housing, etc., to a company selling them a service. And also recognise that companies could use such information for profit.

ECs that are energy suppliers need to be informed about legal frameworks and should ensure their clients that they are upholding them.



TIP FROM ZEZ CONSIDERATIONS FOR SAFEGUARDING VOLUNTEERS

Ultimately, ECs hold responsibility for participant safeguarding when recruiting volunteers to help carry out work and/or Home Visits. For safety and greater comfort, ZEZ organises for volunteers to do house visits in pairs. They also ensure that volunteers are carrying mobile phones, and a project manager is available to answer any urgent needs.

ZEZ has established the following actions – as basics for volunteers:

- Successfully **complete an interview** with the volunteer programme, which should include relevant questions
- Supply a **certificate of impunity** before being enrolled in volunteer training.
- Clearly **display a badge** that identifies their name and affiliates them with ZEZ, during all Home Visits. When scheduling Home Visits, ZEZ also emphasises to households the importance of refusing to let anyone without this nametag enter their homes.

ECs need to ‘on-board’ new skills

ECs tend to be staffed by people with technical expertise and business know-how, reflecting the need to balance smooth operations and financial viability. Taking the decision to engage in energy solidarity brings unanticipated dimensions. A fundamental question, then, is “what skills and which people do we need?”

Given the particular characteristics and needs of energy-poor households described above, (who may or may not be EC clients or members), people who will manage and/or deliver energy solidarity actions require exceptional social skills. ECs should not assume that social ‘instincts’ will be enough and understand that it may be inappropriate to reassign existing staff or volunteers to energy solidarity projects – even if they express interest and especially if they do not.

Once the decision is taken to implement energy solidarity measures, ECs should take specific steps to prepare the organisation and its staff and/or volunteers. This includes actions such as developing clear protocols for interacting with individuals in vulnerable situations, coupled with mechanisms to monitor that the protocols are being followed consistently. It is also likely that specific training should be initiated in areas such as active listening, using clear and non-judgemental language, and expressing empathy and understanding. All staff and volunteers should be given certificates to acknowledge completion of training and should sign documentation acknowledging that they have been made aware of these internal processes. The protocols should also establish ways by which staff and volunteers can suggest changes to better reflect their experience in the field.

Effective continuous professional development within ECs may include aspects of dealing with

difficult situations as well as both team building and lone-working procedures. To ensure the physical and mental well-being of staff and/or volunteers, it should also cover topics such as health and safety, stress management, and self-care.

Ideally, ECs would onboard these skills by engaging individuals with extensive training and experience in sectors such as social work and community engagement. Before sending them out in the field, ECs should ensure such recruits have sufficient knowledge and know-how to answer questions about technical aspects of energy, energy poverty and energy solidarity.

CEES pilots also demonstrated that the additional workload is likely to disrupt business models. This raises a second question as to whether an EC can bring on new staff or will need to rely on volunteers.

Filling the skills gaps

When first taking up energy solidarity measures, ECs may need to budget both time and funding for building the capacities of existing staff, recruiting new personnel or engaging volunteers. New approaches to time management may also be needed, particularly for those working on the social side of the work. Often, the social work must start well in advance of any technical work and be carried through over the duration of any intervention.

A list of potential training topics, while not exhaustive, already reflects the wide range of areas that must be considered. Not all staff will need to be skilled across all areas. Frontline workers, for example, might need more training dedicated to understanding energy poverty and energy solidarity and on the soft skills. In-depth knowledge of privacy law, by contrast, is most important to people collecting or processing data.

Technical knowledge	Soft skills
<ul style="list-style-type: none"> • Energy poverty / causes and consequences / how to identify and engage with household experiencing it* • Energy solidarity / mechanisms to tackle energy poverty • Ethical guidelines • Legal and policy aspects / data security / privacy laws • Stakeholder network / who else is involved in the fight – why, how and where? <p>* Mechanisms to IDENTIFY and ENGAGE are covered in much more detail in Chapter 4.</p>	<ul style="list-style-type: none"> • Interpersonal communications • Empathy • Conflict resolution • Active listening • Effective teamwork • Cultural sensitivities • Crisis intervention • Being attuned to problems such as depression and addiction (e.g. alcoholism, drug abuse, gambling)

Many ECs already have energy advisors (EAs) on staff to help customers practise responsible consumption and save money on bills. Adopting energy solidarity practices will inevitably require ECs – and especially EAs – to undertake new kinds of work in new and unfamiliar spaces. They are most likely to be interacting directly with people who have unfamiliar and often challenging life experiences and life situations. Indeed, CEES Partners reported that EA sometimes encountered severe deprivation and desperation.

As such, EAs are core to energy solidarity programmes and may require the broadest, most in-depth and ongoing professional development. To act effectively, they will need to be kept up to date on all the main factors that influence energy poverty and are relevant to energy solidarity. These include technical aspects such as home energy efficiency, insulation, heating systems and renewable energy sources. But it also extends to related areas such as energy suppliers, tariffs and meters; energy saving behaviours; relevant legislation; and available grants and schemes.



As EAs are most likely to interact directly with households experiencing situations of energy poverty, they also need to have strong interpersonal and/or soft skills.

Three CEES Partners (Allenergy, Enercoop and ZEZ) that carried out training for EAs found that building their energy know-how was more straightforward than ensuring they developed the essential soft skills identified above. This further emphasises the importance of recruiting people with the right social skills.



TIP FROM CEES

PRIORITISE A STRONG PRESENCE, ACTIVE LISTENING AND INCLUSIVE COMMUNICATION

ECs should be present in their community often, with the intent to observe and learn – rather than lead and educate.

To grasp the issues that are affecting their daily lives, take time to listen to their stories, both individual and collective.

To understand what makes people happy, worried, inspired or proud, EC staff and volunteers need to be skilled at the art of relaxed, informal conversations that demonstrate empathy and build trust.¹³

Eventually, ECs do need to speak – and should thus be aware of the power of language to either make people feel heard, safe and valued or misunderstood and alienated. When leading or engaging in dialogue, ECs should take into account these basic principles:¹⁴

- **Acknowledge differences among people** – and avoid using patronising concepts, stereotypes, false hierarchies and generalisations.¹⁵
- **Ask individuals and groups how they wish to be referred to**, rather than making assumptions.
- **Maintain a sharp focus** – i.e. avoid mentioning characteristics that are irrelevant to the discussion.¹⁶
- **Keep asking, keep learning** – language, cultural norms and identities are constantly evolving; stay engaged to stay up to date.

These principles should be applied to all outreach and engagement activities, particularly those targeting underrepresented groups.

To help manage time and funding devoted to training and/or professional development, ECs might opt to develop some short tests to determine the knowledge and skill levels of staff or volunteers who will become active in energy solidarity mechanisms or of people they are thinking of onboarding.

13. <https://www.rescoop.eu/toolbox/community-energy-a-practical-guide-to-reclaiming-power>

14. SCCALE inclusivity guide

15. <https://joinhandshake.com/blog/employers/70-inclusive-language-principles-that-will-make-you-a-more-successful-recruiter/>

16. <https://www.oxfam.org.uk/about-us/the-inclusive-language-guide-when-we-include-everyone-we-can-overcome-poverty/>



TIP FROM ALIENERGY

PROTECTING THE WELL-BEING, HEALTH AND SAFETY OF STAFF AND VOLUNTEERS

Helping lift people out of energy poverty can be tremendously rewarding work. It can also be emotionally and psychologically demanding and distressing. ECs have a responsibility to establish and implement workplace practices to support the well-being and resilience of staff and volunteers engaged in this work.

ECs might arrange group sessions on well-being and resilience or dedicated 'in-office' days to disconnect from field work and re-connect with colleagues. Management should also engage one-on-one to ensure people can express concerns they might not want to bring up in group sessions. Group sessions might be facilitated by well-being and resilience professionals.

ECs must also consider the MUCH broader topic of health and safety (H&S) of everyone involved in their activities. While the scope and scale of such a policy is well beyond the scope of the Energy Solidarity Toolkit (for reference, the policy of ALIenergy is 224 pages!), a sampling of what it should cover can be helpful.

- prevention of accidents and work-related ill health
- emergency procedures
- risk assessment
- lone working.



TIP FROM ENERCOOP

TRAINING AN ENERGY SOLIDARITY TASK FORCE

Once it took the decision to establish an Energy Solidarity Task Force, Enercoop knew it needed to boost the knowledge and skills of everyone who would be involved.

Recognising that national contexts – and related policy and legislation – vary widely, Enercoop invited diverse external entities to present on the situation in France. Some explained the French definition of energy poverty, as well as its causes and consequences. Others mapped out the roles of various actors and the range of interventions that could be proposed to Enercoop customers.

The training also covered more practical aspects, such as:

- Developing a standardised question guide to help Task Force members determine the profiles and needs of the clients.
- Creating a supportive environment that includes additional internal training to help Task Force members deal with sensitive situations and well-being sessions to help members cope with their own experiences and emotions.
- Presentation slides from training sessions have proven to be invaluable: Enercoop has used them numerous times to educate more staff and enhance their approach to practising energy solidarity, leveraging the knowledge being gained by the Task Force.

Assigning roles: staff or volunteers?

With an eye on the time-intensive nature of these interactions and the need for people with soft skills, many ECs turn to volunteers to carry out the 'personal' work.

ECs must consider the pros and cons of both options, and perhaps settle on a mix that best suits their needs and capacities (including financial capacity). Either way, ECs must ensure that anyone engaging directly with households has appropriate training in the soft skills that will both build trust and facilitate gathering the information needed to take meaningful action.

Over the long term, maintaining consistent conduct and levels of service is critical to supporting vulnerable households. To build trust, ensure confidentiality and execute an effective intervention

plan, it is ideal to have a single point of contact for each household, even though a broader team (spanning social assistants to technical experts) may eventually become involved. The point person should have comprehensive knowledge of energy poverty and the ways in which the EC can implement energy solidarity. Critically, they should also have specialised training in working with vulnerable people on sensitive issues.

Aspects to consider when assigning roles	
STAFF	VOLUNTEERS
<ul style="list-style-type: none"> • Experts, yes; neutral, maybe not: ECs may be keen to directly connect with vulnerable households in their communities to demonstrate energy solidarity. If, however, initial attempts are perceived as a bid to 'sell' memberships or secure an investment, the target groups may become wary. The same negative outcome may arise if the first interaction focuses too heavily on technical details they may not understand. 	<ul style="list-style-type: none"> • 'Neutral actors' with no vested interest: Individuals who are clearly identified as volunteers have the advantage that people quickly understand they are not selling anything or seeking any personal gain. As locals who are simply socially engaged, volunteers may have more success in initiating dialogues and opening doors. When recruited from among people who have experienced energy poverty, volunteers can connect with target groups in more personal ways, helping to build trust and broaden networks.
<ul style="list-style-type: none"> • Employment contracts support consistency: ECs tend to attract people committed to the principles of a just, clean energy transition. The security of an employment contract can motivate them to stay on, particularly if they have opportunities for professional development. For ECs working with vulnerable people, staff stability can have enormous value in terms of providing consistent service and achieving deeper engagement. Employment contracts usually include a clause regarding the time expected when an employee decides to leave, which supports recruiting and training the replacement. 	<ul style="list-style-type: none"> • Risk of high and unexpected turnover: People who volunteer are typically highly committed to causes that align with their personal values. Some will dedicate substantial amounts of time over many years to a given association or organisation. ECs must keep in mind, however, that volunteers may decide to disengage at any time, for many different reasons. This reality may influence what roles to assign and the degree to which it makes sense to invest in training.
<ul style="list-style-type: none"> • Staff costs can be high: Across CEES pilots, partners found that identifying and engaging with vulnerable households (and with other agencies that could support connections) required a great deal of time. When considering if a particular energy solidarity mechanism is financially feasible, ECs must consider all aspects of personnel costs, including salary, social charges, and any other legal obligations (e.g. insurance), as well as reimbursement of expenses that employees might incur. 	<ul style="list-style-type: none"> • Volunteers are never completely 'free': An EC's bottom line often plays a role in choosing to work with volunteers. But ECs must account for staff time needed to recruit, train and keep volunteers organised and motivated. Staff need to support volunteers working in the field, e.g. by being available to take calls or answer questions, or to organise meetings to share experiences. Keeping volunteers motivated may also involve organising social events to show appreciation. Budgeting for costs related to things such as administration and insurance coverage is vital. Finally, volunteers should never be 'out of pocket' for expenses related to their work. Direct costs for transportation, food, etc. should be paid up front or reimbursed quickly upon submission of receipts.
<div style="text-align: center;">  </div> <p>TIP FROM ZEZ</p> <p>SETTING EXPECTATIONS WITH VOLUNTEERS – IN BOTH DIRECTIONS</p> <p>.....</p> <p>For ZEZ, a key part of onboarding volunteers is making sure everyone understands the roles and responsibilities of each party. To this end, ZEZ prepares a contract that outlines the following elements (among others).</p> <ul style="list-style-type: none"> • For volunteers, an agreement to: carry out tasks described and participate in relevant training; furnish a 'Certificate of Good Conduct' (issued by the government); conduct themselves in a professional manner; retain all receipts for expenses; collect data required; and return items supplied by ZEZ. • For ZEZ, the commitment to: provide training for the tasks; furnish documents (e.g. household surveys and flyers to leave behind); supply equipment (e.g. scissors, pliers, measuring tape); have appropriate insurance and safety measures; reimburse expenses incurred (upon provision of receipts); and offer support for health and well-being. <p>Setting such details out in a contract adds an aspect of formality to activities that rely on volunteers, which sometimes suffer from high turnover, leading to high costs for ECs in terms of recruiting and training more volunteers. Or worse, being unable to deliver services as promised to households in energy vulnerability.</p>	<ul style="list-style-type: none"> • Keeping volunteers motivated: Volunteers often engage with an organisation because they see an opportunity to participate in making things better for people around them and their community. In short, they find the experience emotionally rewarding. In reality, ECs often need assistance with more mundane tasks such as updating databases, creating mailing lists, and preparing for or cleaning up after events. To keep volunteers engaged over the long term, ECs should seek to balance tasks, identify what skills volunteers have to offer and create opportunities for them to develop new skills. They should also be open to fresh ideas from volunteers. Conveying how even the 'behind the scenes' work is vital to practising energy solidarity can keep motivation up.

Assessing EC capacity – at a glance

CEES pilots have demonstrated that the capacity of an EC to adopt solidarity mechanisms depends on its ability to cover two primary things: material costs and human resources (time and associated costs). Both of these are closely tied to how easy or difficult it is to replicate a given mechanism, taking into account how it might need to be adapted to a different context.

To help ECs get a sense of what they will need to get started, CEES has developed a set of symbols to indicate what is relatively easy to implement and what implies higher costs, more labour and a higher level of difficulty in replicating.

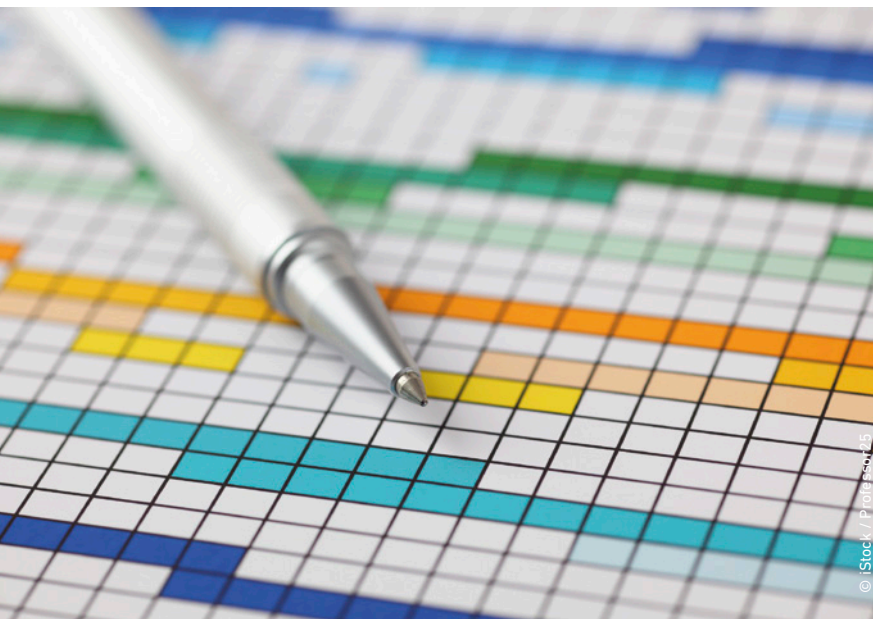
CEES pilot projects emphasise the extent to which practising energy solidarity differs from the more typical work of ECs. In particular, it involves new kinds of work and different types of engagement with an unfamiliar set of members and/or customers. To date, research shows that most EC members have a relatively high level of education and sufficient financial resources to pay

membership fees or make investments. Putting energy solidarity into practice will mean learning how to support people who may have lower levels of knowledge and are coping with challenging life experiences and situations, including economic hardship and social isolation.



ASSESSING YOUR CAPACITY – AT A GLANCE

Material costs	Human resources	Ease of replicability
\$	⌚	🔄
Low costs, possibly covered by existing budgets.	Not much time is required, likely in-house staff can add it to existing roles and responsibilities.	Few factors, whether external (e.g. community context, existing policy) or internal (e.g. business model), are likely to constrain replication.
\$\$	⌚	🔄🔄
Costs are high enough that additional and/or external funding may be required.	Time required is significant and may imply engaging multiple staff and/or re-assigning roles. In turn, this may make it necessary to consider budget lines for staff time.	Some factors (external or internal) may need to be considered and/or modified in order to minimise constraints.
\$\$\$	⌚⌚	🔄🔄🔄
Substantial material costs will be needed to implement the measure, implying dedicating staff resources to fundraising.	The mechanism requires substantial time, which may include time devoted to planning, fundraising and eventual implementation.	Some key factors (external or internal) may present substantial barriers to replication.



Project or programme planning

ECs typically have substantial experience in planning and executing technical projects. While this can be invaluable in terms of establishing budgets, assessing necessary resources, and mapping timelines, the social elements of energy solidarity actions may introduce new elements and uncertainties.

That said, it remains relevant to apply many of the same parameters and practices, such as setting overall aims as well as specific objectives and key performance indicators (KPIs) to track progress towards them.

Anticipating the time and resources involved in practising energy solidarity must appropriately account for a huge range of new activities and related processes. While not exhaustive, the following list highlights various matters to consider, some of which are featured in subsequent chapters of the Toolkit.

- Training and/or recruiting staff to ensure the right skill sets and implementing measures to ensure their well-being.
- Establishing protocols for identifying and engaging with households, including securing their consent for interventions and for data collection.
- Identifying and engaging with other entities to collaborate with, to leverage knowledge and expertise while boosting efficiency and effectiveness.



TIP FROM CEES

GET READY FOR DEALING WITH DATA

As will be demonstrated across this Toolkit, ECs practising energy solidarity are likely to engage not only with many households but also to collaborate with many other actors.

The importance of setting up adequate and robust data management systems cannot be overemphasised. ECs should consider the following:

- Secure storage (e.g. cloud computing) for all documentation and relevant resources
- Effective software or systems to manage client information to ensure consistent, efficient follow up.
- A database of potential partners and collaborators, including the skills they have and the services they offer.
- Access protocols to ensure the right people (e.g. administrators, social workers or energy advisors) can easily find the information they need while other information remains protected and/or anonymised.

A related task that can require substantial resources up front is ensuring a level of consistency across all these areas, for example by setting up templates for documents and standardised systems for data entry across distinct yet interconnected platforms.

Data collection helps drive decisions and actions

As noted elsewhere, energy poverty manifests differently in diverse contexts. Understanding who is most affected, in what ways and what coping mechanisms they may employ is a vital starting point for designing meaningful interventions. Establishing relevant baseline data points and diligently inputting information are critical to being able measure progress and identify areas for improvement in energy solidarity approaches. It can also demonstrate the effectiveness of actions and attract additional funding or collaborations.

- Setting up data management systems (in line with GDPR requirements) to track all activities and interactions.
- Calculating time and materials budgets.
- Carrying out risk assessment and planning for risk management.
- Fundraising to support new activities and related costs.



TIP FROM CEES PARTNERS BEWARE OF BECOMING OVERWHELMED

While energy poverty is a chronic challenge, the current energy crisis has made the situation much worse for some while pulling others into it for the first time. As such, demand for assistance is at an all-time high and many people are truly desperate and distressed.

ECs need to consider that, for each household, a positive relationship exists between the depth of engagement and the likely impacts on reducing energy poverty (Burchell et al., 2015). Not surprisingly, the more resources (time, type of engagement, funds and material costs) devoted, the greater the positive impacts.

But few organisations have the resources (financial or otherwise) to support everyone who asks for help. Thus, a critical element of programme planning is to strike a productive balance among three factors: depth of engagement per household; cost of engagement per household; and the number of households that can be reached in relation to available resources.

In turn, ECs should set up systems that will prioritise support to the households in greatest need. Such systems should be easy for the programme delivery team to implement and avoid being overly intrusive for householders.

Establishing related policies and protocols is not straightforward, as many external factors come into play, including things such as local regulations, climatic conditions and cultural norms.

A tension will always exist between the desire to offer some help to the greatest number of people or devote substantial resources to a smaller group of the neediest.

What is critical to avoid is overextending financial or human resources and losing credibility by not delivering the services promoted or promised. Or putting your organisation at financial risk or having staff or volunteers leave because of burn-out.

CEES partners found staying on track with proposed programme timings to be a substantial challenge, particularly as they were piloting mechanisms they had never before integrated into their broader work programmes. Ultimately, while acknowledging the vital importance of planning, CEES partners caution ECs about being careful not to 'over-plan'. One risk is that it will delay getting started on what is likely to be a long process during which many things are likely to change.

Budgeting time and finances

CEES Partners consistently found that serving the needs of people in energy vulnerability can take a lot of time – and is thus resource-intensive. ECs will need to carefully consider how many people they hope to serve and how many people and what financial capacity they will need to do that. They also need to recognise that these individuals (or teams) may need to operate in non-conventional ways, for example extending Home Visits to build trust or hosting community events outside of regular office hours. Their job (or volunteer) descriptions should set clear frameworks within which they can make independent decisions while avoiding management and approval structures that would undermine their ability to be responsive to unexpected situations.

Most of the insights CEES Partners gained in relation to budgeting time are reflected in **Act** (Chapter 5), while **Financing** (Chapter 6) offers more detailed information about innovative ways to try to cover associated costs.

Summary of Energy Solidarity Tools

A fundamental aspect of the CEES Project was that each Partner that either was an EC or worked closely with people in situations of energy vulnerability would agree to pilot at least one new energy solidarity mechanism over the course of a full year. Most mechanisms had already been implemented and proven effective by another Partner. Over the three-year roll-out, Partners collaborated closely in the following ways:

- **Year 1** - Partners chose the mechanisms they would pilot, set up action plans and sought mentorship from experienced peers. Partners also received guidance from the University of Birmingham on how to plan for eventual evaluation of their pilots.
- **Year 2** - A full year was chosen to pilot new mechanisms in order to give time to identify and engage with households and collaborators and to implement measures across all four seasons.
- **Year 3** - The final year of CEES has focused primarily on evaluating outcomes of the pilots. During this time, CEES also offered capacity building workshops to help other ECs start planning and/or implementing energy solidarity measures.

In the post-pilot phase, CEES Partners were assessed how easy or difficult it was to implement each measure in terms of material costs, human resource and overall replicability.

table useful for getting an initial overview of what mechanisms may align with their existing capacities. Each mechanism is described in more detail in the relevant chapters, along with tips from the CEES Partners that chose to pilot it.

ECs planning to incorporate energy solidarity into their vision and mission may find the following

	Material costs	Human resources	Ease of replicability
IDENTIFY AND ENGAGE			
Identify alert signals in the target community	\$		
Establish a referrals network	\$		
Recruit community energy champions	\$		
Set up an Energy Solidarity Task Force	\$\$\$		
ACT			
Hosting Energy Cafés	\$		
Distributing Energy Boxes / Cosy Kits	\$\$		
Energy Advice Home Visits	\$		
Generating local energy supply	\$\$\$		
Shared and Supported Self-Renovation	\$\$\$		
FINANCING			
Donation-based crowdfunding	\$		
Micro-donations	\$\$\$		
Corporate donations, fiscal and others	\$		
Community energy revenues	\$\$\$		
Grants	\$		
Cooperative loans and crowdfunding	\$\$		

3 / Evaluate

Taking stock of efforts and impacts

Putting energy solidarity mechanisms into practice aims to improve the lives of people living in energy poverty. Indeed, as per CEES objectives, it should move them towards having access to sufficient, affordable energy that enables 'human flourishing'.

For this reason, it is important to plan – at the outset – ways that ECs can evaluate whether their actions are delivering the intended impacts to targeted communities.

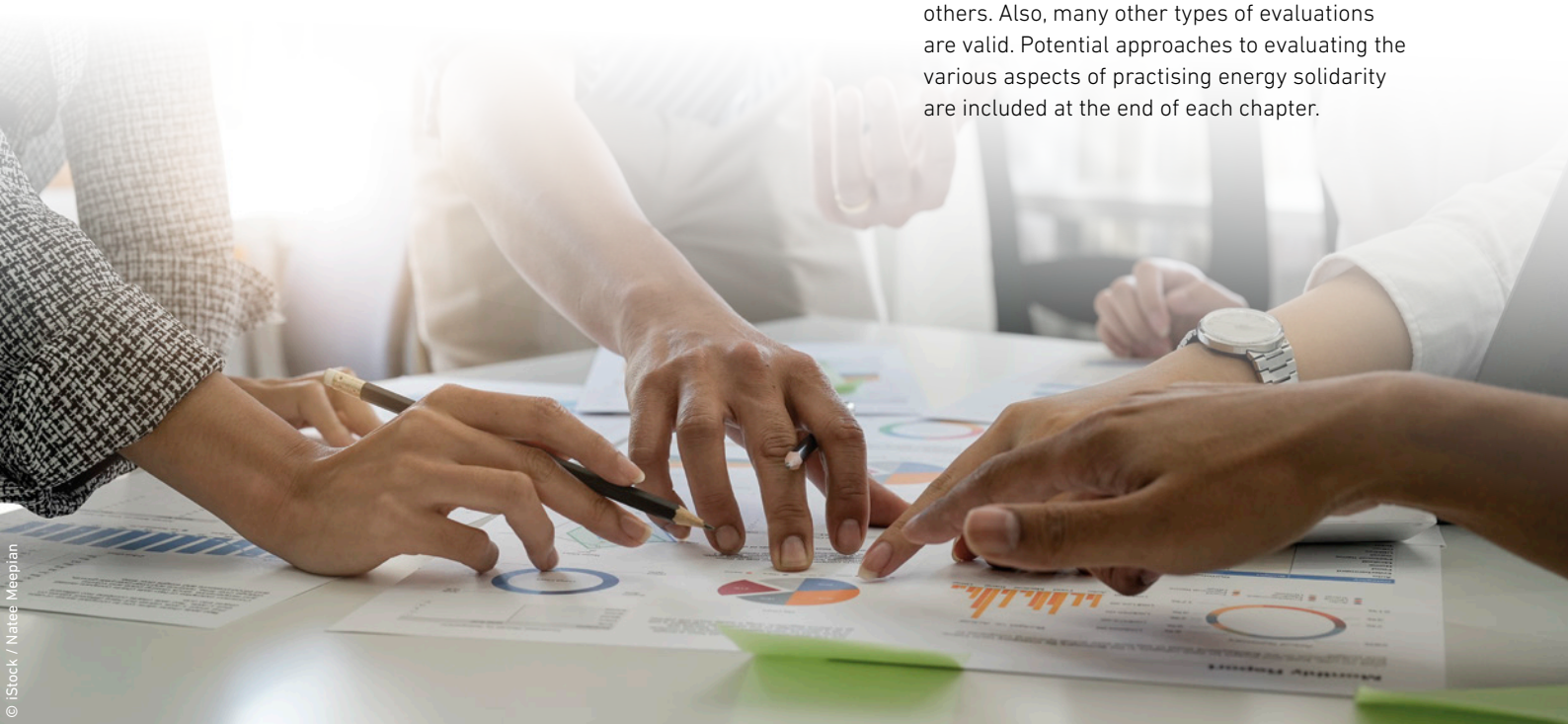
Also, as noted in the opening chapters of this Toolkit, practising energy solidarity can be relatively easy and low-cost or extremely time- and resource-intensive. Well-planned evaluation can help project managers to understand the impacts relative to the effort that has been put in.

What to evaluate, why and how?

Evaluation is a systematic study of a project (or programme, practice, procedure, intervention or initiative). It aims to help assess whether predetermined objectives were achieved and to understand what factors helped or hindered along the way.

As implementing energy solidarity mechanisms is new to many ECs – and may require new skills, different business models and additional sources of financing – being able to demonstrate clear impacts is critical on many levels. Ultimately, comprehensive evaluation strategies can help ECs to constantly develop and improve their processes and projects.

To help ECs get started, this chapter provides an overview of options and things to consider, rather than an exhaustive 'how-to' methodological text. Noting that energy solidarity projects can take many forms, the approaches described in this chapter may be more relevant to some than to others. Also, many other types of evaluations are valid. Potential approaches to evaluating the various aspects of practising energy solidarity are included at the end of each chapter.



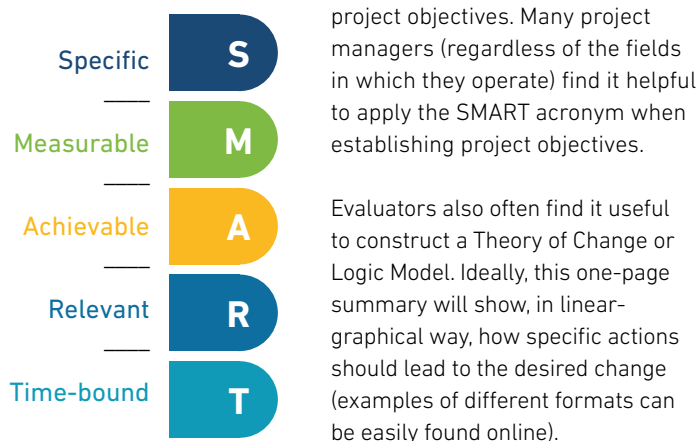
Why evaluate?

Evaluation is an increasingly important tool to support decision making across virtually all sectors of society, including in relation to the just, clean energy transition. When properly planned for from the beginning, the information, data and learning that comes from evaluation can be used by multiple actors in vital ways.

- To constantly improve processes and impacts so that projects can meet their objectives.
- To demonstrate credibility and build trust among target groups and/or potential collaborators.
- To help other ECs implement projects that achieve stated goals more effectively and efficiently.
- To strengthen future bids for funding by showing both clear impacts and the organisation's capacity to constantly learn, develop and adapt.
- To have solid evidence to include in communications materials and reports.

How to plan for evaluation

Evaluation plans should align closely with a strong project plan, which sets out clear and coherent



Ideally, the project and evaluation plans will be developed in parallel, with close collaboration among individuals or teams that hold responsibility for different aspects.

Timing is critical to effective evaluation. Thorough planning is needed up front and sufficient time must be allocated at the end – after the project is completed – for data analysis and report writing. Including funds for that time in project budgets is also vital. Many researchers suggest earmarking 10-15% of the total budget.

A strong evaluation plan will start with the fundamental elements of background and context; project objectives; and corresponding evaluation objectives. Building on the stated evaluation objectives, it should then set out a series of evaluation questions and attach key 'indicators' to each. In energy solidarity projects, for example, indicators of energy poverty typically include things like not being able to afford energy bills or being too cold in winter or too hot in summer. But other aspects should also be considered, such as associated negative impacts on health and well-being. The plan should also outline the overall evaluation design and specific evaluation methods to be applied.

Finally, a timetable should demonstrate how evaluation aligns with the project itself. In fact, evaluation should be allocated additional time after the formal end of the project. This is vital for final data collection, analysis and reporting. This point is particularly important when preparing timetables in funding bids.

Evaluation carries an inherent challenge, particularly for organisations that are small and have limited budgets – which is the case for many ECs. The desire to establish evaluation processes and procedures to collect the necessary data must be balanced in relation to the burden they place on participating households, the project delivery team and the evaluators.

Basic principles of evaluation

Evaluation, particularly in relation to energy solidarity mechanisms, may be new territory for many ECs. While not aiming to be exhaustive, the following material clarifies some key principles and approaches to think about in evaluation.

Ethics in evaluation

Respect for project participants is core to ethics in evaluation. As such, ECs must invest time in developing a robust ethical framework that appropriately considers the following elements.

- **Anonymity:** At no point in the project reporting should it be possible to identify participating individuals.
- **Informed consent:** Any individual from whom an EC wants to collect data must be fully informed of what data will be collected, who it will be used by and for what purpose(s). This is especially critical for participating households but also applies to colleagues and external

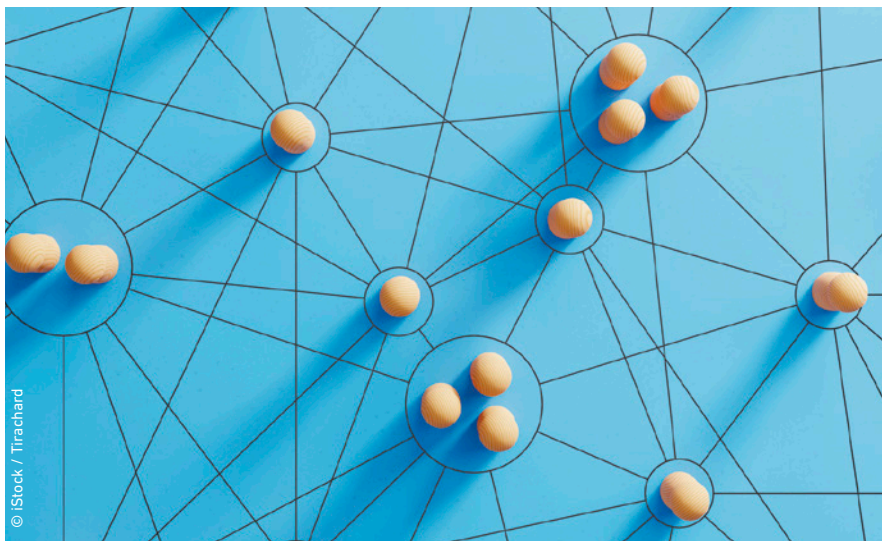
partners. Preparing a clear, concise agreement form on which the participants' agreement can be recorded is vital.

- **Data management and related systems:** Protecting data, especially personal data (anyone's personal data must be protected, not only that of vulnerable people), may also be new to ECs. An appropriate strategy must first comply with EU's [General Data Protection Regulation](#) (GDPR) and/or any locally relevant frameworks. It should also set out protocols for data collection, storage, sharing and eventual disposal.

Five fundamental evaluation approaches

Ideally, evaluation will include efforts to assess both the processes applied and whether the intended impacts were achieved. In reality, these evaluations often overlap or have blurred lines. Evaluation undertaken during the project (formative) can inform whether some adaptations may be needed to achieve desired outcomes while after-the-fact evaluation (summative) can help determine what might be done differently in a next iteration of the project. To optimise their usefulness, both formative and summative evaluations should consider impacts and processes.

- **Impact evaluation** aims to understand, across all groups involved, the *change* produced by the project. Typically, it is carried out by asking participants to respond to a set of identical questions before and after their participation. Alternatively, it is possible to simply ask questions after the intervention, focusing, on aspects of change and experiences of the intervention.
- **Process evaluation** seeks to understand what happened during the project implementation, including how various groups experienced it. Evaluating processes helps to identify which impacts were or were not achieved and to pinpoint where things went off track. In turn, this highlights where and how processes might be improved.
- **Formative evaluation** is carried out during the project, seeking to collect helpful data and feedback for the project delivery and/or management teams. This can help identify if things are not going as planned and signal the need for changes in direction or practices.
- **Summative evaluation** is carried out both during and after a project. It aims to provide information, data and learning for reporting and future project development.



- **360° evaluation** prompts consideration of and engagement with all of the sources from which it might be helpful to gather information and data. In the context of an energy solidarity project, a 360° evaluation might include: participating households; the project delivery team (e.g. energy advisors, fund-raisers, volunteers); the project management team; project documentation; and external partners (e.g. energy agencies, local governments, health and social care services, civil society organisations).



TIP FROM UOB ACTING AS A 'CRITICAL FRIEND'

Whether evaluations are carried out by internal staff or external people, it is very helpful to think of the evaluator as **'a critical friend'** of the project. This framing carries two messages:

- First, it implies engaging as a friend who is supportive and committed to helping the project succeed.
- Second, it establishes an expectation that the evaluator will, indeed, 'critique' the project. This is likely to require maintaining an objective independence or distance from the project and the project team to feel comfortable in pointing out shortcomings or missteps and offering advice.

The shared goal of people involved in managing or delivering a project and those evaluating it should be to derive vital learnings for further development and improvement.

4/ Identify and Engage

Establishing vital connections

Struggling to pay energy bills is a deeply personal matter, which many households try to self-manage by reducing consumption, cutting other expenses, foregoing other necessities, or developing various coping mechanisms.

In turn, lifting people out of energy poverty often requires intervention by many different actors with diverse expertise.

When CEES Partners began implementing their pilot projects, it seemed logical to distinguish between efforts to 'identify' and 'engage', as actions on two distinct levels, possibly following a linear progression.

ECs would need to identify 'who' needed help before trying to connect with them. In turn, ECs making their first foray into tackling energy poverty might benefit substantially from identifying and engaging with organisations that already have links to households in vulnerable situations.

In fact, CEES Partners found that these activities overlap and intertwine, rarely in any linear way. For this reason, the Energy Solidarity Toolkit presents all relevant content together in a single chapter.

Cross-linking to implement energy solidarity

While the mechanisms by which ECs will identify and engage households in situations of energy vulnerability are likely to vary, it is often useful to start getting to know the broader context. What policies or practices currently lead to injustices for some groups? Who is most affected? How does lack of affordable energy contribute?

During this early stage, ECs may also start to consider the possibility of working with local collaborators that have shared or complementary aims. Potential collaborators typically include municipalities; housing associations; public social, health and care services; and third sector organisations (also known as civil society organisations or CSOs) working in the same geographic area or on the same social challenges.

A few basic tips can help ECs get started. More detailed descriptions for approaches with track records of successful implementation are found throughout this chapter.



IDENTIFY	ENGAGE
Households	
<ul style="list-style-type: none"> Identify households in energy poverty Understand their specific needs Assess their eligibility for assistance through your planned project 	<ul style="list-style-type: none"> Attend targeted events to meet householders Distribute information about your service and how to access it Invite referrals from local collaborators (see below)
Local collaborators	
<ul style="list-style-type: none"> Identify other organisations providing services to vulnerable homes Identify other organisations who may be looking for ways to provide services 	<ul style="list-style-type: none"> Make contact and meet with collaborators, online or in person Provide information on energy poverty, your activities to alleviate it and how to refer clients

The idea of cross-linking with both households and local collaborators can be vital to developing a robust understanding of energy poverty in the local context and how it intersects with other vulnerabilities. In turn, it can facilitate the process of co-developing solutions that are effective for all parties – especially the households.

“ Ensuring that people understood the services ZEZ provides are free was critical in early efforts to engage with households. Often, they did not register to receive the energy efficiency kits because they thought they would be expected to give something in return. Many were also afraid of getting ‘scammed’ because of past experiences. ”

Paula Damaška, ZEZ

These first steps need to be undertaken in ways that are practical and manageable for ECs, households and local collaborators, based on information that the various parties can easily obtain or supply. Processes for identifying and engaging in all directions should be relatively simple and easy to understand. A key aim of this stage should be to clarify who will do what to quickly deliver initial benefits to households in vulnerable situations.



TIP FROM COOPÉRNICO CHOOSE YOUR PARTNERS WISELY

Without doubt, partnering with trusted organisations can have tremendous value, particularly to new ECs or ECs wanting to make in-roads in new communities. But a few words of caution are warranted.

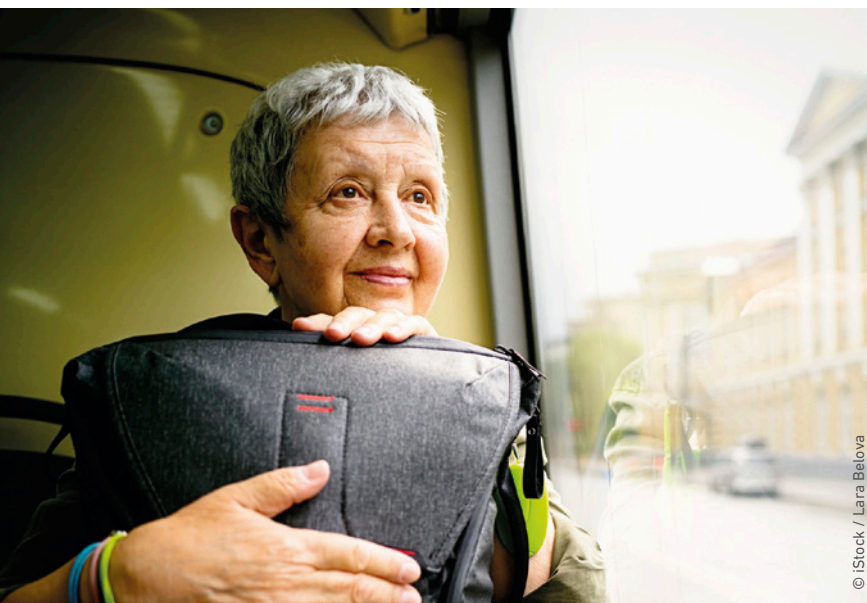
First, understanding how target audiences perceive any potential partners is critical. Engaging with other actors who are already well-known and highly trusted can substantially boost your outreach, legitimacy and effectiveness when trying to reach vulnerable households. But it can also work the other way. Becoming linked to a distrusted organisation risks having to later make a clean break and start again from a disadvantaged position.

Doing a background check and asking around the community for opinions of a potential collaborator can help determine whether to pursue a deeper relationship or avoid becoming associated with an organisation that could undermine your own credibility.

Also, given their limited resources, ECs should be aware that adding more people or organisations to any programme or activity means more meetings, more time building relationships, and more complicated processes. Often, it also creates a need to identify shared, parallel or diverging goals, which implies negotiating roles and responsibilities. The inability to advance quickly and independently can lead to frustration and to general entropy.

More partners can also increase the chances of miscommunications, either among the group or towards the target audiences.

ECs must thus carefully weigh the pros and cons of acting alone versus collaborating with others. And feel confident that each partner can bring a level of value that exceeds any problems that might arise.



Identify alert signals in the target community¹⁷

Like energy itself, situations of vulnerability are often 'invisible' – and people living in them may go to great lengths to mask difficulties they are facing. EC staff and volunteers need to learn to use all of their senses to detect subtle signs.

Keep an eye on vulnerable groups

Specific groups are known to be at much higher risk of vulnerability. While seeking to be discrete, they often devise coping mechanisms that can give off clues.

17. https://energy-poverty.ec.europa.eu/system/files/2023-03/EPAHandbook_diagnosis_finalpdf.pdf

ASSESSING YOUR CAPACITY – at a glance		
Material costs	Human resources	Ease of replicability
\$		
Appropriate IT equipment needed to conduct research, engage with other stakeholders and produce communications materials.	Resources required to conduct desk research on poverty, social deprivation, and energy poverty, connect with relevant local organizations, and launch communications activities to engage with stakeholders.	Ease of replication may depend on the degree to which the Member State has transposed relevant directives and collects data.

Vulnerable groups	Telltale behaviours
<ul style="list-style-type: none"> • older and retired people • people with disabilities • people with long-term health and/or mental health problems • women, particularly widowed or otherwise single • single-parent households • refugee and immigrant groups, who may also be experiencing language challenges • people in rental accommodations • young adults, who may be students or ineligible for social assistance schemes 	<ul style="list-style-type: none"> • Minimising energy use at home by <ul style="list-style-type: none"> - wearing outdoor clothing (coats, hats, scarves and gloves) to stay warm - leaving lights off; unplugging appliances - eating unheated meals - not doing laundry • Avoiding heat loss or cold draughts by <ul style="list-style-type: none"> - Stuffing old clothes into cracks in doors, windows, walls and floors - Keeping curtains drawn all day • Seeking free heat outside the home by <ul style="list-style-type: none"> - passing time in public spaces (e.g. libraries, coffeeshops or shopping malls) - riding free buses and trams - lingering at school or workplaces - staying over with friends and relatives



TIP FROM ENERCOOP
ARREARS ON ENERGY BILLS ONLY REVEAL SO MUCH

As an energy supplier, Enercoop has access to an alert signal that many CSOs and others would not: irregularities in payment of energy bills.

While important to notice and follow up on, Enercoop warns other supplier ECs that this data point reveals relatively little. Deeper, more personal engagement is needed to better understand the situation of an individual household or how energy poverty might be affecting a wider community.

To get the big picture, it is critical to connect the dots across multiple indicators.

Be aware of ‘life moments’ that can be life-changing

Day-to-day energy needs or the ability to keep up with energy bills are often linked to moments of big change in people’s lives. The arrival of a new baby or the diagnosis of a health condition can mean needing new devices that drive up energy demand. Job losses or retirement may mean getting by on a lower income while also spending more time at home, and thus having higher consumption.

While a growing family may trigger the need to move into a bigger home, a family breakdown may mean having to maintain two. The death of a spouse, particularly after adult children have moved away, often means one person is burdened with more space than they need or can afford.

Extreme weather events, natural disasters and other emergencies, can throw unexpected spikes in energy demand or high costs for other necessities into the mix.

New baby	Reduced working hours	Sudden change in outdoor temperature
relationship breakdown	Job loss	Breakdown of heating system
Death of spouse / family member	Retirement	Rise in energy costs

Clearly, there is little reason an EC would know that people are experiencing some of these circumstances. Thus, to help identify and engage

with such individuals, ALIenergy has established strong relations with frontline workers in other organisations such as housing associations, health and social care workers, and various charities. It offers training on how to watch for the alert signals and effective ways to initiate dialogue related to the possibility that people are experiencing energy poverty (on top of or along with other challenges).



TIP FROM ALIENERGY:
ENGAGE WITH TRUSTED SERVICE PROVIDERS TO BUILD A NETWORK OF ENERGY CHAMPIONS

A wide range of government agencies and CSOs already provide support to households experiencing the impacts of life-changing events – and have developed high levels of trust in local communities.

A vital way that ALIenergy engages with such entities is to offer to train their staff to recognise signs of energy poverty when making Home Visits or speaking to people by phone or in video conference. The training includes non-invasive ways to initiate dialogue about energy use and struggles with paying bills.

These external ‘Energy Champions’ need not become experts in their own right. Rather, the aim is to leverage the relationships they have already established to bring another set of eyes and ears to any vulnerable situation. Should they detect instances of energy poverty, they can help households to access appropriate assistance through a referral, or through signposting, or they can secure the permission for the appropriate entity to establish contact directly.



Recognising that the stigma associated with asking for and receiving help is a barrier for many people facing situations of energy or other vulnerabilities, ALLenergy aims to normalise the use of its services. It also makes special effort to enable access for all — particularly hard-to-reach individuals.

Related advice for educating and training frontline workers, recruiting 'Energy Champions', and establishing a referrals network is covered below.

Note the status of dwellings

Poor quality houses are a major contributor to high energy demand and excessive energy bills. Identifying such dwellings – whether individual homes or multi-family buildings – can be an indirect way to identify families in vulnerability. It is important to keep in mind that high walls or a thick stand of trees may make it impossible to 'see' the quality of a home from the street. In other regions, the challenge may be that houses are in remote, hilly areas or on islands with few inhabitants.

Also, the efficiency of a particular dwelling may not be obvious as insulation is hidden behind walls or in attics or floors. Finding out whether a given house has an Energy Performance Certificate is a helpful start, but not always easy to obtain.

Outside clues
<ul style="list-style-type: none"> • Degraded roof and walls • Old windows • Condensation in windows • Curtains drawn at all times • Mould on the outer walls of the house
Inside clues
<ul style="list-style-type: none"> • Cold temperature, cold draughts • Damp and mould • Use of space heaters • Holes in roof, walls and floor • Condensation on windows



Thermal imaging of a home's exterior reveals its 'hot' and 'cold' spots. Here, walls and windows (red areas) are letting warm air escape while the roof area shows better capacity to keep heat in. Notably, there are no blue areas in this photo, which would identify where insulation is working effectively. Photo: iStock / Ivansmuk.



TIP FROM ENERCOOP ASKING THE RIGHT QUESTIONS IN THE RIGHT WAY

People in vulnerable situations may perceive that it is their own fault – and their own problem to fix. As such, they may avoid 'offering' information that could reveal how desperate they are.

Structuring a set of questions that focuses on the condition of the dwelling can be a way to start an insightful dialogue that establishes trust. Examples include:

- What kind of heating system do you have? Or maybe you use more than one type of heating?
- What is the usual temperature in your home during the day? At night?
- Do you heat the whole house or only the rooms your family uses most often?
- Do you have any condensation around windows?

Gradually, the conversation can be shifted to how the condition of the home impacts the occupants.

- Do you or others in your household often feel cold?
- Do you or others have any health problems that might be related, such as allergies, frequent coughs and colds, asthma or headaches?

Establishing a climate of trust is crucial; otherwise, it becomes challenging to pose such sensitive questions.

A few thoughts on building trust

People in vulnerable situations often self-isolate to avoid having others 'see' how precarious their lives have become. Some may worry that they or their children will be removed from homes that have become unhealthy. Others may be afraid that landlords will evict them if authorities become aware of the poor living conditions. Some will have already had disappointing experiences with CSOs or government agencies that offered help but never delivered.

CEES Partners experienced this reticence in various ways and offer the following thoughts and tips.



TIP FROM COOPÉRNICO STRATEGIES AND ACTIONS FOR EARNING TRUST

Vulnerable people often have legitimate reasons, including bad experiences in the past, to be wary of organisations offering free or low-cost help.

ECs need to ensure that anyone who represents them consistently acts in trustworthy and respectful ways. This means always doing some things and completely avoiding others:

ALWAYS:

- do what you say you will
- express empathy and support
- ask questions carefully and offer a clear explanation of their purpose

AVOID:

- over-promising
- implying judgment or blame,
- asking people to engage in complicated and burdensome processes

Hiring staff or recruiting volunteers with demonstrated experience in similar roles can be hugely valuable for building trust and securing credibility.

“ There are people in every community caring for and empowering others. When you meet them, consider involving them in your energy project, or think about what you could learn from them.¹⁷ ”

REScoop.eu

“ Once you have identified and visited one household, try to tap into their experience to help their peers – as a favour to them and to you. This is an organic way to set up an insider referral system and the best way to overcome the obstacle of distrust. Once one member of a vulnerable group reports good and trustworthy service, others are likely to engage more easily. The process becomes easy and seamless. ”

ZEZ

18. <https://www.rescoop.eu/toolbox/community-energy-a-practical-guide-to-reclaiming-power>





Engage others to be on the lookout

ECs cannot be everywhere at once, or all things to all people. As noted above, identifying and collaborating with other local actors that are tackling energy poverty or offering other support to families and individuals in vulnerable situations can be vital. Indeed, formalising joint efforts may help ECs expand and/or validate the list of alert signals and get more people to keep their senses tuned.¹⁹

19. https://energy-poverty.ec.europa.eu/system/files/2023-03/EPAHhandbook_diagnosis_finalpdf.pdf

Establish a referrals network

As noted elsewhere, people living in situations of energy poverty are often vulnerable in many other ways as well. In practicing energy solidarity, ECs should be conscious of this reality and actively seek ways to bring holistic approaches. This does not imply having the expertise to address any and all problems. Rather, it means being highly informed of what entities are best placed to help in what ways – and collaborating to do so in efficient and effective manners. Which raises the need to establish effective referrals networks internally and at the local level.

ASSESSING YOUR CAPACITY – at a glance		
Material costs	Human resources	Ease of replicability
\$		
Uses existing information and resources.	Extensive time required to liaise and attend meetings of other relevant support organisations and to train frontline workers about EP.	No special materials or new expertise are required to engage in communication and building professional relationships.

Types of entities to engage in a referrals network	
<p>FORMAL</p> <ul style="list-style-type: none"> • government agencies • health and social care workers • social housing providers • finance and debt agencies • local / neighbourhood committee • social welfare centres 	<p>CSOS</p> <ul style="list-style-type: none"> • food banks • charity or second-hand shops • churches • community centres • public kitchens • local foundations / organisers of donation campaigns • informal initiatives with a mission to help vulnerable groups

An effective referrals network serves a dual purpose. First, it should track EC engagement with vulnerable households over the full course of delivering energy-related assistance. Second, it should provide easy access to other services and service providers relevant to the household's situations and needs.

Ideally, referral networks work both (or multiple) ways. As well as accepting referrals for people who are likely to be facing energy poverty, ECs can point people towards relevant services offered by others.

While time-consuming to set up, the value of a referrals network lies in the ability to leverage

connections to deliver holistic support. They can exponentially increase awareness of energy poverty and, in turn, an EC's reach and impact. They can also serve as a feedback loop between the EC and target groups. This ensures that the implemented solutions are continuously monitored and adapted based on real-time feedback, improving their effectiveness and relevance.

ECs making initial contact with other service providers may find themselves to be 'newcomers' to a well-established local network. But awareness of energy poverty may be low and services may be lacking. The opportunity to learn more and expand the range of services to vulnerable people is likely

to be welcomed and creates a valid reason for ECs to 'knock on doors' and introduce themselves. Initial contact may be with managers or executives who have decision-making authority, but the ultimate aim should be to connect with frontline workers.

A critical point to consider before making contact is to assess, to the extent possible, how other local organisations are perceived – i.e. are they trusted – by the target groups.

“ Building a trusted referral network has enabled us to effectively engage with many vulnerable and hard-to-reach individuals who would not have come forward by themselves. ”

ALLenergy



Tapping into frontline workers

'Frontline workers' refers broadly to any person working for a government agency, CSO or other service-oriented entity that may come into contact with people who are vulnerable in one way or another. Training such people to understand energy poverty and recognise its signs, as well as the principles and actions linked to energy solidarity, can be a vital way to establish first contact and begin matching needs to available services. Because of their 'outreach' and 'intake' roles, frontline workers may become the 'point person' for people who are unlikely to ask for help.

Frontline workers, whether employed by an EC or another entity, bring value in terms of:

- **Accessibility:** Typically stationed at service counters or answering telephone hotlines, their physical or online presence supports ease of access for people who need help.
- **Local knowledge and cultural sensitivity:** Often local residents themselves, frontline workers have in-depth knowledge of the community. They may share the same or similar cultural backgrounds, and thus understand people's habits. Being familiar with specific challenges and constraints that people in the area face, they may also be able to anticipate their needs.
- **Trusted 'point people':** Such familiarity can facilitate open communication and help build trust.

Generally, the aim of connecting with frontline workers should be to educate and train them on many of the same topics and skills described for EC staff and volunteers (see Chapter X). Training sessions might cover the following:

- an overview of energy poverty in the area, its extent, causes and effects
- a summary of the types of assistance and energy solidarity measures the EC can provide
- demonstrated value, including case studies or statistics on impacts achieved to date; if the EC is recently established, the focus can be on expected outcomes based on upfront analysis
- clear instructions on how the potential partner could refer clients to the EC's services.

ECs should also practice active listening in these interactions, as the knowledge of frontline workers may help them customise energy solutions based on the unique requirements of the community. They should also convey their willingness to learn about each potential partner and how to be mutually supportive to deliver the best outcomes to clients.

ALLenergy recommends that, rather than hoping frontline workers will attend information sessions offered, ECs should invite themselves into meetings being organised by others to discuss the needs of vulnerable and disadvantaged people. Get in contact with your local networks and search for upcoming opportunities to share your service.



TIP FROM ALIENERGY
MAKING REFERRALS QUICK AND EASY

Referral networks facilitate communication by many parties, in many different directions. They are only effective, however, when connections are easy to make.

To ensure ease of access to the energy solidarity services they offer, ECs should carefully consider who needs what, and how each group is most likely to connect.

Typically, some combination of a dedicated phone line, an email account and/or online portal will serve diverse groups.

Each channel should be developed based on the skills, cultural habits and traditions of the groups most likely to use it. Online portals and email access might be preferred by staff at other organisations. Digital illiteracy or lack of access to computers and the internet, however, might prevent certain groups from being able to access services through these channels. They may prefer being able to call and speak to someone in person.

Whichever mechanisms are set up, they should be designed to ensure people do not get 'lost in the shuffle' and quickly find information independently or connect with a person who can help them do so.

Such systems must also be designed to uphold privacy obligations.



TIP FROM REPOWERING LONDON
COMMUNITY ENERGY CHAMPIONS AS AGENTS OF CHANGE

Working in some of the most economically poor and ethnically diverse areas of the British capital, Repowering London knows first-hand that the people who most need their help can be the hardest to reach. Recruiting community members to act as Energy Champions has proven vital to boosting engagement and to understanding the needs and aspirations of people whose voices often remain unheard.

- **Empower residents as agents of social change** through training, volunteering and employment opportunities within research, innovation and engagement workstreams.
- **Create employment** where possible for Community Energy Champions to act in the development and delivery of energy poverty alleviation actions.
- **Boost diversity** by including representatives from, or at least people with experience of engaging with, different sectors of the community: different age groups, genders and ethnicities, as well as those with diverse health issues or disabilities, etc.

for the enormous value of people who bring 'lived experience'.

Bringing people on board who know first-hand the daily struggles and difficult decisions that arise from inadequate and unaffordable energy often proves invaluable. Often, their engagement can draw others from historically underserved or underrepresented groups, ultimately boosting the EC's legitimacy and credibility.

Recruiting community leaders as energy champions can help break down language and cultural barriers,

Recruit community Energy Champions

ECs aiming to take action to tackle energy poverty need to adopt an open mindset regarding the notion of 'expertise'. While they may bring certified training in energy technologies, business models and legal or administrative areas, they need to make space

ASSESSING YOUR CAPACITY – at a glance

Material costs	Human resources	Ease of replicability
\$		
Localised / simple campaigns to recruit volunteers and/or solicit community participation.	Training, monitoring and supporting Energy Champions requires substantial dedicated staff time.	May depend on community structure and demographics, cultural and language barriers, and design and delivery of services.

including in the design and delivery of awareness campaigns, collective action, local advocacy or technical training. Their local 'roots' and on-the-ground knowledge will be invaluable on many levels.

A commitment to making this a paid position (rather than volunteer) can demonstrate that the EC appropriately values the time required and is invested in improving the economic situation of individuals in the community.



INSPIRING PRACTICE

TELHEIRAS RENEWABLE ENERGY COMMUNITY

Creating an EC that includes and engages everyone – including both vulnerable energy consumers and groups who are currently underrepresented – is an overarching ambition of Telheiras Renewable Energy Community (REC). Producing and sharing renewable energy to mitigate energy poverty is at the heart of its mission.

To achieve its missions, Telheiras REC has partnered with the Lumiar Civil Parish (Portugal) to identify three vulnerable families to which it already provides some type of social support, who will be invited to join the EC.

Recognising that membership fees are often a barrier to such families joining an EC, the Parish will invest on behalf of two families while other EC members will cover costs for the third. This will allow the three families to participate at a reduced fee of just €8.00 annually.

To start the process, social workers contact families with information about the project, the benefits of their participation and the special conditions under which they can become members.

Vulnerable families register for the project using an application form (and may request support from a social worker, if needed). The Parish validates applications and holds a random draw to allocate available places to non-producing members, who then become social beneficiaries.

Telheiras REC is also keen to ensure that everyone – including the three vulnerable families – can engage in governance of the community, with equal voting rights.

It also takes steps to boost energy literacy through talks, events, training, advisory services and capacity building.

Success of the pilot scheme can be measured in several ways:

- High participation of the local community and support for the energy solidarity measure, which shows the efficacy of communication and engagement efforts by all parties.
- Pre-registration in the EC (for general members, not vulnerable families) was full in 13 minutes.
- Winning the Urban Doers Grant, awarded by the Driving Urban Transitions Partnership.
- Obtaining a preliminary license from the national authority, even though EC licensing is still a long and complex process in Portugal.

REC Telheiras has drawn the attention of national- and European-level institutions and of organisations working on energy poverty and of energy communities. It is mentioned in the latest Staff Working Document of the European Commission, Recommendation on Energy Poverty, in the case studies of the Energy Communities Repository, and in numerous high-profile events.

The project was selected for technical assistance by the EU Energy Poverty Advisory Hub and is receiving support from Coopérnico (a CEES Partner) and CENSE FCT-NOVA (Centre for environmental and sustainability Research) at the University of Lisbon. In a later stage, Telheiras REC aims to include building renovation to improve energy efficiency in its activities.

Created through the Parceria Local de Telheiras (Local Partnership of Telheiras), the EC brings together a network of local institutions, organisations and associations along with informal neighbourhood groups. This facilitates sharing of information and resources, networking, and collaboration for organising events.

Set up an Energy Solidarity Task Force

ASSESSING YOUR CAPACITY – at a glance		
Material costs	Human resources	Ease of replicability
\$\$\$	⌚⌚	🔄🔄🔄
Substantial material costs will be needed to implement the measure, implying dedicating staff resources to fundraising.	The mechanism requires substantial time, which may include time devoted to planning, fundraising and eventual implementation.	Some key factors (external or internal) may present substantial barriers to replication.



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- Closely follow policy changes (at national or local levels) that have implications for practicing energy solidarity.
- Establish networks with public agencies or CSOs engaged in energy solidarity to coordinate actions and interventions, thereby providing more holistic services in more efficient ways.

Determining 'how' the Task Force will operate is also crucial, particularly because it influences the resources required. Questions to consider include:

- How can Task Force staff acquire the information and knowledge necessary to effectively support / advise vulnerable households?
- What mechanisms can be put in place to identify and engage with customers who may be experiencing energy poverty?
- Once a vulnerable household is identified, will Task Force staff carry out direct interventions or play the role of an intermediary and alert other organisations?
- Will Task Force staff help assess whether vulnerable customers are eligible to access financial funds or other help available? Or merely point them in the right direction?

For ECs that reach a certain size in terms of human and financial resources – and have a substantial client base – setting up an Energy Solidarity Task Force can be an effective way for trained employees to provide targeted services to potentially vulnerable households.

Such a Task Force can fulfil several roles:

- Serve as the focal point for all interactions with vulnerable clients, as well as with EC members and board members, external organisations and local policy makers.
- Educate all staff about energy vulnerability and protocols to direct any clients who may be struggling to the Task Force.

Securing a senior champion, recruiting the right staff, and establishing protocols

For ECs to fully participate in the just, clean energy transition, the principles of energy solidarity should be embedded in their culture. As the work is likely to be cross-cutting, securing the support of a high-level champion is crucial to unite staff across different departments. High-level engagement can also draw attention to this commitment both internally and externally.

Selecting or recruiting the right people is the next crucial step. Organising awareness and/or specific training sessions can potentially spark interest. Some employees may be eager to become engaged in tackling energy poverty. Others may feel it does not align with their skills or expertise, or that it is too difficult on a psychological or emotional level. ECs should validate both perspectives by recruiting those who want to engage and not putting pressure on those who express discomfort. Ultimately, vulnerable customers will need to feel reassured that people they are speaking to are empathetic, patient and able to convey information clearly. As such, those who want to be involved should be evaluated for the soft skills needed to carry out this work effectively.

Ultimately, the Task Force needs to be a dedicated and well-trained team capable of articulating messages effectively and adapting communication appropriately. They should be well-trained in navigating emotional and challenging interactions with customers, equipped with the tools needed to develop a comprehensive understanding of diverse client situations, and well-informed regarding available assistance programmes offered by the EC or by other actors.

The basic elements of a Task Force protocol for each customer might include the following steps:

- Initiate contact with clients and ask standardised questions regarding their housing situation and energy bills.
- Conduct Home Visits, if feasible, to obtain a fuller picture.
- Establish a schedule for follow-up calls (e.g. every two weeks) to cultivate a long-term relationship, build trust and provide tailored assistance for various situations.

Another key role of the Task Force is to monitor changes in the 'environment' in which they operate, which includes tracking changes to legislation and



Enercoop held a series of training sessions to help members of their staff and the Energy Solidarity Task Force understand the causes and impacts of energy poverty. Photo: Enercoop.

who is doing what – or, indeed, what is NOT being done – to advance energy solidarity practices. The Task Force should also be responsible for setting clear goals and establishing monitoring and evaluation mechanisms that will help measure progress towards them. Or guide adjustment to plans and processes if goals are not being met.

The work involved in carrying out the roles defined above may be substantial. As such, ECs need to carefully consider how they will cover staff costs and any expenses related to establishing and maintaining a Task Force. As EU Member States are now obliged to tackle energy poverty, it may be possible to apply for government support. A growing number of corporations and foundations are also offering support for energy solidarity actions.



Case study. Enercoop Energy Solidarity Task Force

With some 80 000 clients and 250 staff, Enercoop is much larger than many ECs in Europe. Also, because it is both an electricity generator and supplier, it has a large customer service department. In the context of CEES, and with the energy crisis of 2022 taking hold, Enercoop was keen to enhance the aspects of its vision and mission that relate to energy justice.

Policy compliance

As a first step, Enercoop needed to reconfirm its compliance with French regulation in relation to customers who fall behind on energy bills. Current legislation requires energy companies to – at minimum – respect the following obligations:

- **Respect the winter ban on disconnections**, which makes it illegal to cut services during winter months (i.e. between 01 November and 31 March).
- **Install smart meters** that display data for electricity and natural gas consumption to help customers keep track of their usage.
- **Provide reduced power (3 kVA) for a period of one month** before cutting off supply.
- **Support people receiving ‘energy checks’ from the government** by facilitating processing of vouchers, setting up payment schedules and extending legal deadlines.
- **Help eligible households access support for rental debt** through a subsidy scheme (*fonds solidarité de logement* or FSL) that provides financial assistance.

Changing corporate culture, establishing new roles

Like all energy suppliers, Enercoop has some customers who fall behind on their bills. In the past, staff from two departments would typically intervene. The Recovery Department was the main point of contact with such households, with a narrow focus on setting up a repayment plan. In turn, the Customer Relations Department followed up to help customers better understand their energy use and direct them towards government schemes to support energy renovation.

Neither department considered whether the household might be experiencing energy poverty.

Aside from representing a cultural shift, the commitment to provide energy solidarity services created an overarching

challenge: how to do more for a small share of customers without creating an excessive amount of extra work for already busy staff (available resources made it impossible to consider hiring new staff).

Enercoop felt that each department still had important roles but wanted to provide a more seamless service from the customer’s perspective. It also wanted to let all customers know it was taking action and make it easier for those struggling to seek support.

For this, Enercoop created a new area on its website with tips about how anyone can reduce energy consumption and, for those struggling with bills, information on what public aid is available. The site gives customers the option to contact the Solidarity Team via email.

Internally, Enercoop established new systems, such as a ‘Solidarity Group’ channel within its customer service software and set up new protocols. Now, when someone falls behind on payments, a trained employee from the Recovery Department makes an initial call that aims to assess whether the household is potentially vulnerable (rather than immediately discussing a repayment plan). The staff member then invites the customer to visit the new area of the website to become more informed about energy consumption and possible assistance.

Once the Customer Relations Department receives an email, it re-connects with the customer with the aim of helping identify solutions that are well-suited to their specific situation. This typically involves making sure the customer understands different public aid options related to finance and energy renovation. Often, these employees also help these customers connect to social workers or consumer associates in other entities.

While the Solidarity Group channel required substantial resources to set up, it is proving invaluable. Both teams now use it on a daily basis to allow quick exchange and to track all interactions with a given customer. The latter is vital to the customer experience as it eliminates the need to explain their situation, which may induce stress, to many different staff.



TIP FROM ALIENERGY
DATA CONSIDERATIONS FOR REFERRAL NETWORKS

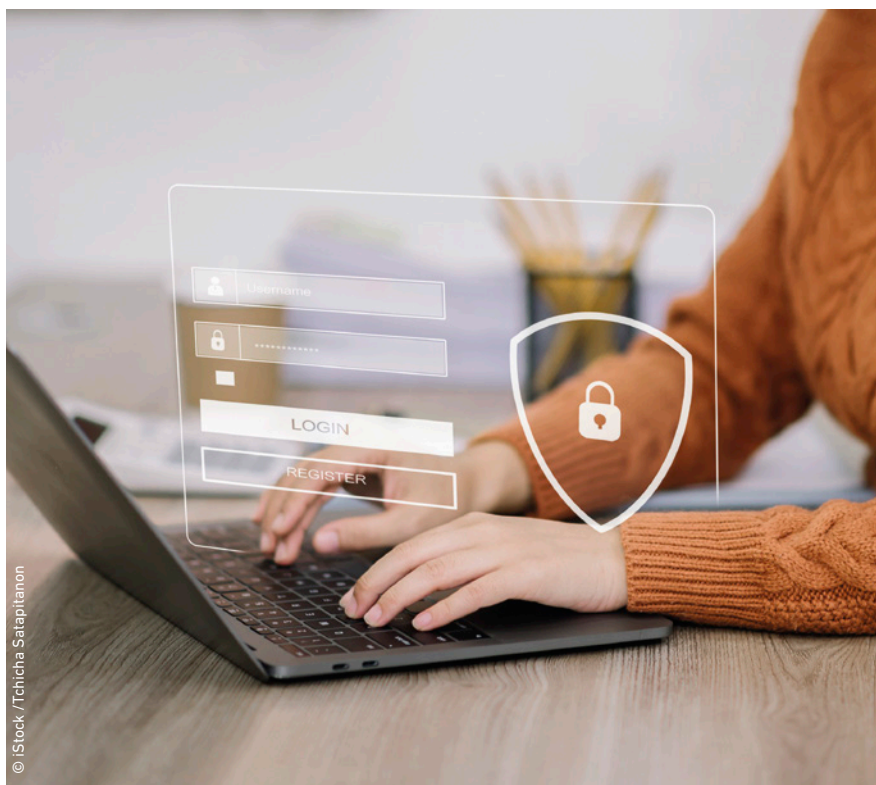
Referral networks can be especially effective in reaching vulnerable households and providing a range of services that improve their situations.

ECs must, however, respect all legal obligations in relation to managing sensitive personal information and data, including GDPR (General Data Protection Regulation) rules that apply within the EU which might restrict who can access or use certain types of data and information.

In relation to clients, ECs must be clear about the support they will offer, the data they intend to collect, and who might use that data and how.

When collaborating within referral networks, ECs must be sure to exercise their role as gatekeepers between clients and service providers.

Note: See also 'CEES Tip: Respecting privacy, upholding privacy laws' in Chapter 2.



Proposed evaluation framework

As noted in Chapter 3, ECs should prepare early on to be able to assess the impacts and effectiveness of their efforts to practise energy solidarity. CEES offers the following suggestions for what to evaluate, why and how.

Evaluating IDENTIFY and ENGAGE mechanisms		
Possible evaluation objectives	<ul style="list-style-type: none"> To understand the processes, how well they went and their impacts. To assess if the mechanism 'recruits' the right households, effectively and efficiently. To understand, if working with local partners, how they experienced the processes and impacts. To improve the mechanism. 	
Possible evaluation questions	<p>PROCESS</p> <ul style="list-style-type: none"> Were the various elements of the plan (e.g. communications, local partner/stakeholder collaboration, assessment of household eligibility for the project) put in place? What successes and/or challenges were experienced in implementing these plans? What measures were taken to respond to challenges? Did they then lead to successes? How can these processes be developed further? 	<p>IMPACT</p> <ul style="list-style-type: none"> Where appropriate, approximately how many households did the communications reach? How many households entered the eligibility assessment? How many households were successful? How successful were the communications in terms of attracting eligible households? How many eligible households were recruited into the project? How many households dropped out during the identify and engage mechanism (known as attrition)? What were the reasons for this? Where relevant, what impacts did local partners experience with respect to energy poverty (e.g. in terms of attitudes, learning, confidence, capability)? What impacts were experienced in terms of developing sustainable relationships for the future?
Possible data sources and methods	<ul style="list-style-type: none"> Households: consistent data collection (using Excel or a client management system [CMS]) across the project to monitor the progress of households through the project. Project managers/delivery team: discussions, reporting or surveys. Local partners: discussion or surveys. 	

5/Act

Putting energy solidarity into practice

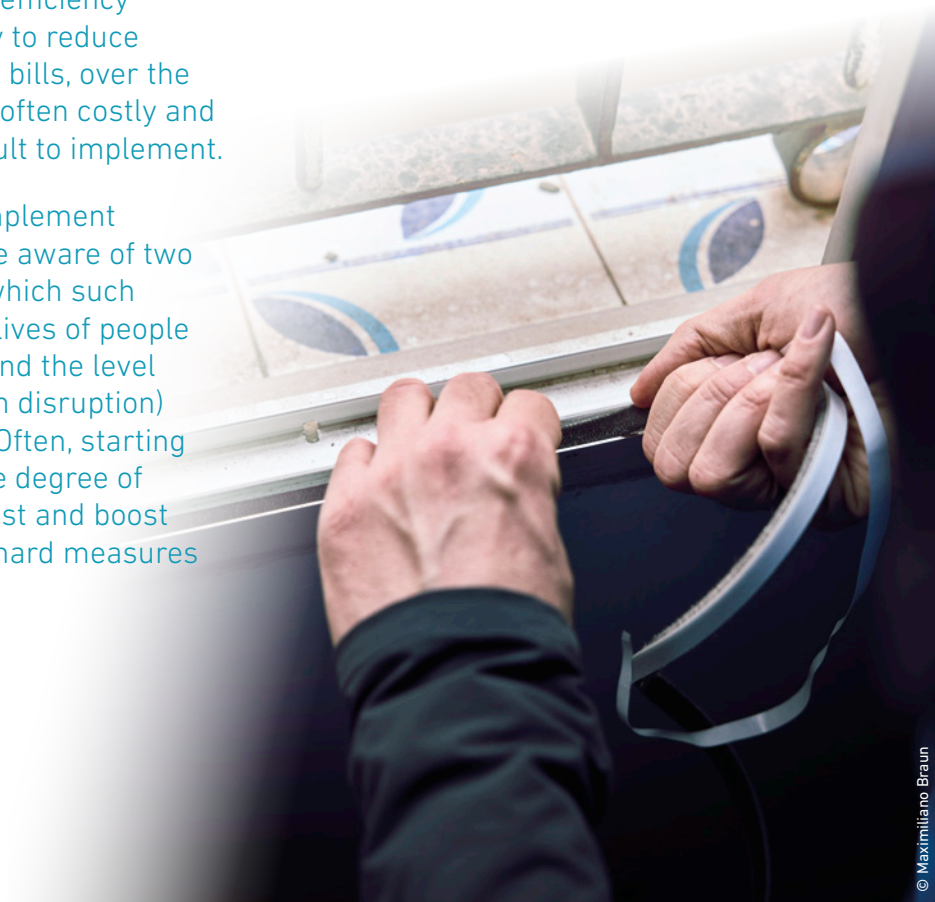
The quality of homes, apartment buildings or other types of dwellings has the largest effect on the energy needed to support the health and well-being of occupants. Across Europe, a high share of old, poor-quality homes is one of the biggest drivers of energy poverty. But personal habits and energy prices also play key roles. For this reason, energy solidarity actions need to balance two approaches:

- **Soft measures** focus on helping energy-poor households optimise energy consumption; they typically involve low- or no-cost actions, such as behavioural advice or switching to LED lighting.
- **Hard measures** – such as energy efficiency renovations – are the primary way to reduce energy demand, as well as energy bills, over the long term. Such interventions are often costly and disruptive; thus, they can be difficult to implement.

Energy communities (ECs) keen to implement energy solidarity measures should be aware of two fundamental factors. The degree to which such measures are disruptive to the daily lives of people in situations of energy vulnerability and the level of resilience (i.e. capacity to cope with disruption) that a particular household exhibits. Often, starting with soft measures can provide some degree of improvement, which can enhance trust and boost resilience, paving the way to pursue hard measures at a later date.

Boosting energy knowledge and know-how

CEES considers that across all actions, a basic aim of ECs should be to boost people's understanding of energy broadly (i.e. their energy knowledge) and how to use it more wisely (i.e. their energy know-how). The former can help them feel more informed about how energy systems work and who makes high-level decisions. The latter aims to equip them with skills to make smarter decisions about their own energy use. Both are part of what many organisations refer to more broadly as 'energy literacy'.



Energy knowledge focuses on understanding factual information	Energy know-how aims to help people use energy wisely
<p>Topics might include:</p> <ul style="list-style-type: none"> Types of energy sources used in local or national systems CO₂ emissions linked to the production and use of different sources How energy production and use are linked to climate change How local or national policies influence things such as which sources feed which systems, and how energy is priced General information about home energy consumption, including energy saving tips. 	<p>Practical skills might include:</p> <ul style="list-style-type: none"> Programming timers on heating/cooling devices and power bars. Checking for draughts around windows and doors, then blocking leaks with weather-stripping. Inserting a chimney balloon to keep warm air from being drawn out of rooms. Using curtains and blinds to slash heat loss in winter or heat gain in summer. Checking insulation in attics. Using appliances and electronic devices more wisely to minimise 'stand-by' electricity consumption.

Hosting Energy Cafés

Energy Cafés are informal get-togethers designed to boost energy knowledge and know-how (i.e. parallel aspects of energy literacy) while also establishing relationships with people in the local community. An important aim is to stimulate dynamic conversations rather than setting up situations in which 'experts' present to 'the audience', which can be a barrier to meaningful engagement.

In fact, Energy Cafés are an excellent opportunity to gather information about the lived experience of people in situations of energy vulnerability and to make participants feel valued for the expertise they bring. Early on, it is critical for the host to demonstrate being eager to learn from participants by letting others take the floor, asking questions and allowing time for discussion and debate. As such, hosts need to be well-prepared, including being well-versed in key soft skills such as using non-technical language and practising active listening (see Chapter 2).



No matter where a café is held, how the space is set up can play a vital role in setting the mood and encouraging engagement. An informal seating arrangement – ideally with people facing each other – also makes it easier for facilitators to come across as listeners first, who are also able to share information and tips. The following table covers key 'non-energy' elements to consider when planning and hosting an Energy Café.

ASSESSING YOUR CAPACITY – at a glance

Material costs	Human resources	Ease of replicability
\$	⌚⌚⌚	♻️
Low costs, possibly covered by existing budgets.	The mechanism requires substantial time, which may include time devoted to planning, fundraising and eventual implementation.	Few factors, whether external (e.g. community context, existing policy) or internal (e.g. business model), are likely to constrain replication.

Non-energy aspects of hosting Energy Cafés	
Audience	Understanding who you want to reach is the first step. However, as noted in Chapter 3, identifying who would benefit most – and convincing them to attend – can be extremely challenging. Recognising that everyone can benefit in some way by participating, ECs should prioritise attracting their target audience(s) without dismissing other interested individuals or groups. Ultimately, ECs may not be in a position to control who actually attends the sessions.
Potential partners	<p>Collaborating with a partner that already has strong connections to the target audiences can be invaluable, particularly for ECs aiming to work in a new area. Not only can they help get the word out, an invitation from a 'trusted friend' substantially increases the chance that people will attend. It may even be possible to embed the Energy Café into an event or activity the partner hosts on a regular basis. Finally, it can help secure a known venue or identify suitable places where people meet in the target area.</p> <p>A word of caution is warranted, however. Agreeing on shared goals and establishing roles up front helps ensure that all parties are satisfied with the end results. Making each other aware of potential constraints is also critical. For example, inability to share contact information because of privacy policies is a valid limitation. If, however, it makes follow-up after the event impossible, a given partnership may make it difficult for the EC to reach its own goals. ECs will want to create a way for participants to 'opt-in' to share their contact information.</p>
Venue	Choosing 'where' to host an Energy Café should also consider the audience's needs. Identifying places where the target audience already feels comfortable is vital. University students may frequent a local pub while elderly people are likely to prefer somewhere quiet and relaxed. A library or community centre might work well for single parents, as they can settle their children into other supervised activities.
Timing	<p>There is no 'right' time to host an Energy Café. Scheduling should seek to align with the target audience. Elderly people may be more available in the daytime and also hesitant to go out in the evenings. Students and working single parents might be freer in the evenings or on weekends.</p> <p>As the event is about to get underway, watch the room closely. Some people will appreciate a punctual start and may become irritated if expected to wait too long. Others may be far more relaxed or may even find it aggressive to not allow time for others to join.</p> <p>The duration of the Energy Café is also important. Generally, an event lasting 1 to 1.5 hours is sufficient to cover a few topics (see below) while not expecting people to stay too long. Hosts should plan to stay at the venue for an extra 30 minutes to be available to speak with individuals seeking more help or information.</p>
Extras	<p>Generally, ECs should plan to offer some type of refreshments for participants. While coffee, tea, juice and biscuits are usually welcome, taking care to order or prepare a traditional food can help establish a connection with a particular cultural group.</p> <p>When inviting single parents, it is a good idea to arrange childcare in the same room or very close by. That way children are less likely to disrupt the meeting while parents can check visually to feel assured that their children are being well attended by people they have only just met.</p>
Follow-up	Distributing the EC's contact details for participants who would like more information, assistance or a Home Visit is vital not only to demonstrate that the EC is engaged and responsive, but also for internal monitoring of the impact of its actions.



Typically, Energy Cafés cover some mix of the topics outlined below. If possible, ECs should run a short, informal survey in advance or incorporate a quiz into the beginning of the event. This helps understand the knowledge level of attendees and gives them the chance to indicate what they most want to learn about.

Energy topics to cover (among others)	
Energy supply and suppliers	Many people are only vaguely aware of where their energy comes from and how that influences final costs. They may also feel unsure of how to compare suppliers and the benefits that could come with changing. This opens the door to also explaining energy communities and the benefits of self-generation, self-consumption and potentially earning revenues by selling excess energy to the grid.
Energy bills	Most energy bills are difficult to understand, even for energy experts. Helping people understand their actual consumption and costs in relation to different tariffs (including during peak or low demand) and the other fees (e.g. taxes and levies) can make them feel more informed.
Energy rights and where to go for help	When people fall behind on energy bills or feel badly treated by their energy supplier, they often feel helpless. Making sure they know their rights and understand the roles of energy advocacy groups or ombudsperson offices can be tremendously empowering.
Energy efficiency	Poor quality housing is a major contributor to energy poverty – and to the poor health that comes from being chronically cold or unable to escape extreme heat. Being informed about small, low-cost ways to stop heat loss (or heat gain in summer) as first and easily actionable steps, can improve people’s health and well-being. This topic can also broach the important element of tenant rights in inefficient rental accommodations.
Ways to ‘spend’ energy better	As many people in situations of energy vulnerability already limit their energy consumption to unhealthy extremes, tips on how to adjust their behaviours to get more value for the available budget can be extremely helpful.



INSPIRING PRACTICE

GAME TIME AT COMMUNITY ENERGY COLCHESTER

Aiming to help people learn how to ‘save money stay warm and use less energy’, Community Energy Colchester wanted to find a new way to stimulate light-hearted (but serious) conversation about a topic that can be rather heavy.

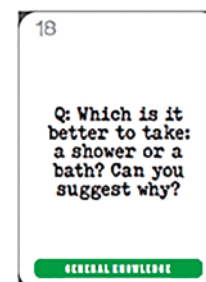
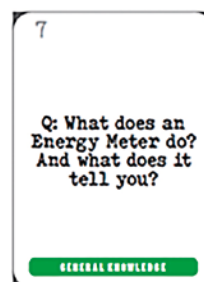
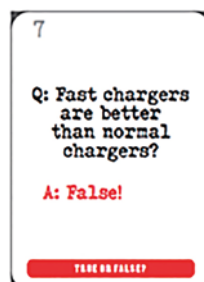
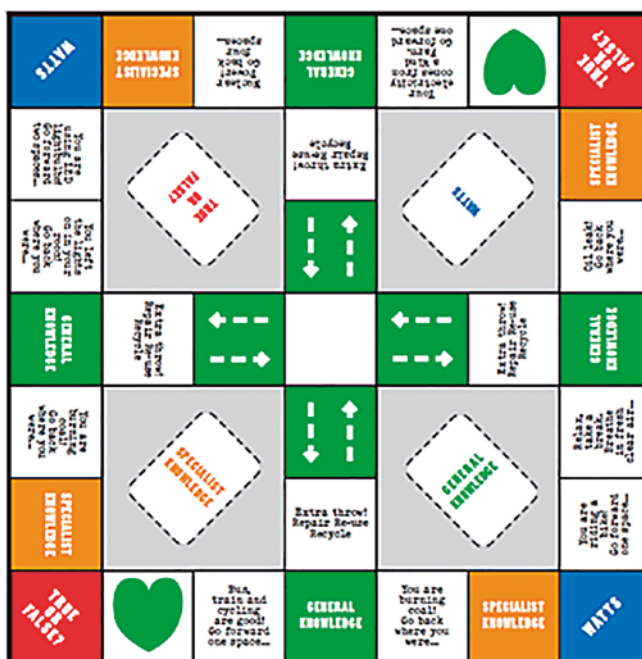
They came up with “Watt’s What?” a game in which players move around the board by correctly answering questions or learning new things about energy in the process.

Games can make the learning process more dynamic and memorable, in part by stimulating questions and debates among players. Importantly, they appeal to young people who may be more open to adopting new behaviours – and may push their siblings, parents and even grandparents to break old, harmful habits.

Across homes in the cities of Colchester and Tendring (in the east of England), Community Energy Colchester has delivered hundreds of low- or no-cost energy-saving measures. With a new series of workshops and events, the EC now aims to increase its impact and reach even more households. The events will link how energy savings measures can help reduce the negative impacts of climate change.

Other games have been developed, such as La Revolt, which Coopérnico translated into Portuguese and used in their CEES pilot with great success, with both younger audiences and adults. The idea to use it emerged in conversations with Les 7 Vents.

Source: Community Energy Colchester “Watt’s What” game



Distributing Energy Efficiency Kits or Cosy Kits

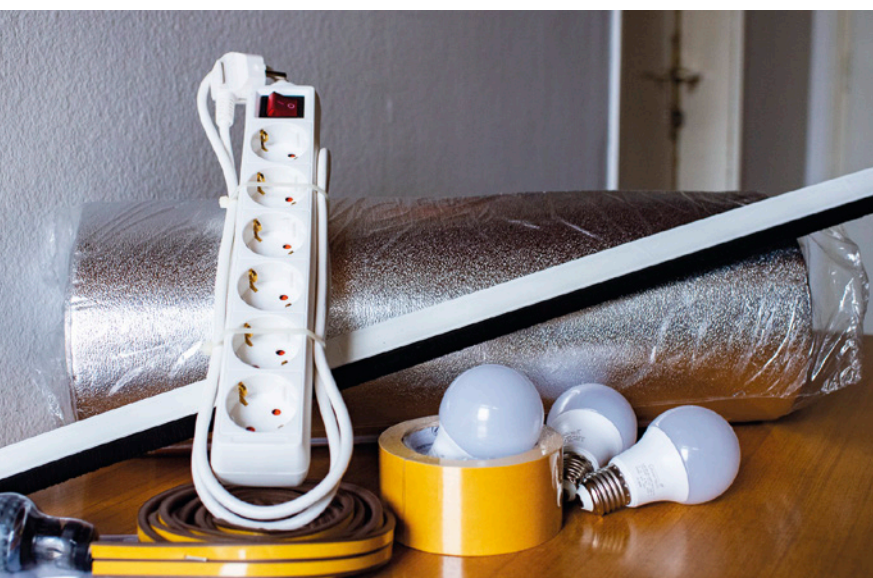
Distributing **Energy Efficiency Kits** or **Cosy Kits** is one of the most common ways in which ECs, CSOs and other agencies seek to alleviate the impacts of energy poverty in the very near term. A 'gift' that improves people's thermal comfort – and in

turn their health and well-being – can also be an effective means to establish one's reputation as having nothing to gain from the interaction and starting to build a trusting, longer term relationship.

Typically, the boxes or kits are prepared with a selection of small, useful items that either help save energy or help people feel warmer. They are also a handy way to distribute more information, including about ways to 'spend energy more wisely', how to change energy suppliers, and other services that households can tap into if they are struggling to stay warm in winter or cool in summer.

A fundamental question linked to preparing Energy Efficiency Kits or Cosy Kits is whether to standardise or customise the contents. The former has the advantage of being more efficient at the purchasing and packaging stages but may result in some families having devices or items that they never use. Customising packages according to questions asked during a telephone interview, for example, can help ensure the families get what is most useful to them but can be extremely time-consuming for EC staff or volunteers.

Delivering the kits in group settings, such as Energy Cafés, can create an opportunity to encourage people to exchange items among themselves. One family, for example, may not need a power bar but would welcome having an extra LED bulb while another family may be happy to barter.



Energy Efficiency Kits or Cosy Kits typically provide a range of items to reduce energy consumption and improve the thermal comfort of occupants. In Croatia, ZEZ included: 12 m of window and door seals; 6 LED bulbs; a door brush; a power bar; two faucet aerators; and 6 m of radiator reflective foil. An educational brochure offered energy saving tips according to different rooms of a house. Photo: ZEZ

ASSESSING YOUR CAPACITY – at a glance

Material costs	Human resources	Ease of replicability
\$\$	⌚⌚⌚	🔄
The cost of items per kit is €12-€15 on average. Additional funds will be needed for communications materials and to reimburse expenses (e.g. fuel) incurred during delivery.	Distribution is time-intensive; recruiting volunteers may help reduce the in-house HR burden but carries costs for training and organisation. ECs also need to consider the potential for volunteer unreliability.	Several CEES Partners were able to replicate this action without difficulty; some adaptations were needed in items included in kits, communications and logistics.

Examples of items to improve thermal comfort or safety	Examples of devices that help reduce energy consumption
<ul style="list-style-type: none"> • hot water bottle • blankets • thermal socks • chimney balloon to stop heat loss and cold draughts • light torch (in areas with frequent power cuts) • cold alarm (which sounds when a dwelling drops below a set temperature) 	<ul style="list-style-type: none"> • insulating strips for windows and doors / draught excluders • power bars with on/off switches • timer device to insert in power sockets • LED light bulbs

ALlenergy typically includes 1 blanket, 1 hot water bottle and 1 pair of socks in Cosy Kits. Their cost, when buying these items in bulk, is approximately €12 per bag. If a given family needs more blankets but no socks, ALlenergy will try to customise as requested. This can, however, lead to running out of stock of one item while having a large quantity of others.

When used in conjunction with Home Visits or Energy Cafés, Energy Efficiency Kits and Cosy Kits serve as a concrete follow-up to discussion that can seem quite abstract to householders, which can be very powerful psychologically.

When delivering boxes or kits, CEES Partners felt sincere appreciation on the part of recipients as the contents were shown and explained. Often, the people targeted would be hard pressed to spend money on such items, even if they understand their value.

More importantly, boxes and kits can quickly deliver tangible benefits, whether it be people feeling less cold or seeing a drop in the next month's energy bill. Over time, that can translate into better physical and mental well-being and additional money to spend on other necessities.



TOP: Close up of items ALlenergy typically includes in Cosy Kits. Credit: ALlenergy.

BELOW: Once kits are assembled, ALlenergy finds they can take up a lot of storage space in limited facilities. Photo: ALlenergy.



TIP FROM CEES PARTNERS

STRATEGIES AND LOGISTICS FOR ENERGY EFFICIENCY KITS AND COSY KITS

While distributing Energy Efficiency Kits and Cosy Kits may seem like a simple way to start helping households, CEES Partners found it to be more complicated than anticipated – especially for small teams.

Planning according to both EC budgets and client needs is vital. In areas of high energy vulnerability, it may be more important to help a large number of families to a small degree. Where the number of families in such situations is lower but their conditions are more extreme, preparing fewer kits with more items may be a better option.

Coopérnico suggests that ECs start by calculating how many households they want to help, then thinking about the three items that would deliver the greatest impacts. If more budget becomes available, more items can be included.

Once the question of what to include is decided, substantial time may be needed to research where and how to acquire the items. Certainly, ECs have a responsibility to research the best prices and try to negotiate discounts for bulk purchases. They will also want to consider the ethical and social reputations of both items and suppliers. The pros and cons of various options will need to be weighed. Buying from local manufacturers, for example, may have the advantage of lower carbon footprints for transportation but higher prices because of local pay scales.

If purchasing a large number of any given item, ECs may have to seek several suppliers. Many CEES Partners also spent considerable time looking for retail partners willing to donate specific items, with varying degrees of success.

Decisions also need to be made regarding the best 'container' for delivery – e.g. a cardboard box, a cotton sack or some other item that might also be useful for the household. Often, the EC wants to use this as a marketing tool, which is likely to involve time and costs for custom printing.

Once the 'what' and 'where' have been taken care of, ECs need to consider how they will transport a large number of potentially heavy packages to their own facilities.

Once the items have been acquired and the containers are ready, substantial time is needed to package boxes or kits. This can be an ideal task for team building with volunteers; as the work does not require a great deal of concentration, setting up an assembly line can be efficient while also creating a social atmosphere.

Storage then becomes a consideration, particularly for ECs that have limited office space. The Energy Efficiency Kits or Cosy Kits need to be 'out of the way' of daily operations, yet also in a secure place that protects them from any damage.

Finally, the logistics of delivery need to be considered. While it may seem efficient to distribute Energy Efficiency Kits or Cosy Kits at events such as Energy Cafés, Coopérnico encountered an uncomfortable dilemma with this approach. Many people who attended the cafés were not likely in situations of energy vulnerability, yet they were attracted by the items in the kits and felt (rightly) that any offer was being made to all attendees equally. This can have the unfortunate effect of leaving ECs with fewer kits to deliver to people who truly need them.

ECs that are new actors in a given community may find it helpful to collaborate with other organisations to deliver the boxes/kits as a means of having a trusted actor introduce the EC. This can also help reduce the resources required for distribution.



Demonstrating energy solidarity through such practical help, even if it is low-cost and provides minor improvements, can help ECs create a more powerful bond with the most vulnerable households in their communities. For people who have long felt marginalised, the experience of engaging with an organisation that ‘practises what it preaches’ can have strong impacts. Also, such families are often told ‘how’ they could improve their situation but lack the tools to do so; the donation of practical tools can be vitally empowering. In turn, it builds the credibility of the EC and the advice it offers.

Energy Advice Home Visits

Providing energy advice services is the most common way in which ECs currently put energy solidarity into practice. As covered in the preceding section, this is often done by hosting Energy Cafés as a mechanism to begin engaging with numerous people in an informative and non-invasive way. As noted, a key aim of the cafés is to establish the EC’s credibility and create an opportunity for interested

parties to have a Home Visit so customised solutions can be implemented. CEES Partners found, however, that it was difficult to attract target groups (i.e. households in situations of energy vulnerability) to the Energy Cafés and even more difficult to get invited to their homes for follow-up visits.

In addition to boosting energy knowledge and know-how, Home Visits provide an opportunity for Energy Advisors (EAs) to collect data or demonstrate the need for more complex actions. Thermal imaging, for example, can help people visualise the ‘hot’ and ‘cold’ spots in their home that drive up energy demand. The EA can also take time to explain energy bills and how fixing the dwelling or changing habits can help reduce costs. Other devices can assess various aspects of indoor air quality and detect levels of humidity, mould or other pollutants.

Critically, Home Visits naturally facilitate invaluable side benefits – particularly if EAs (or other staff or volunteers) are in the home for an extended period of time or make multiple visits. As described in Chapter 2, when ECs have on-boarded the right skill sets, those who are invited to enter homes can watch for other signs or listen for clues during casual conversation. They may identify additional signs of energy vulnerability or of related vulnerabilities that others within their referral networks are better equipped to address (see Chapter 3).

Preparing for a first Home Visit

Informing the home occupants in advance regarding who will come and what to expect is vital to effective Home Visits. While information flyers distributed at events (such as Energy Cafés) can provide basic background information, ECs should

ASSESSING YOUR CAPACITY – at a glance		
Material costs	Human resources	Ease of replicability
\$		
Reimbursing staff or volunteers for out-of-pocket expenses (e.g. fuel) associated with deliveries.	Some time is required to train EAs to be empathetic and respectful during visits. A greater risk is that, as many energy-vulnerable individuals are older and socially isolated, they may want EAs to engage for extended periods. ECs should plan visits carefully to ensure EAs can maintain their schedule without compromising the needs of other households.	Cultural and social norms affect how easy it may be to implement Home Visits in different countries or communities. ECs will likely need to find ways to build trust before being welcomed into the homes of target groups.

organise a telephone appointment so they can answer any questions and describe the Home Visit process in more detail. During the conversation, they should tell the occupant who will be visiting and how to identify them as being connected to the EC (e.g. the EA or volunteer will present a badge or identity card). This telephone call can be critical to setting a friendly tone, demonstrating effective listening skills and starting to establish trust. When speaking to a single woman, for example, the EC representative should ask whether she is comfortable having a man come to carry out the visit or would prefer that it be a woman or a man and woman together.

The telephone call can also make the Home Visit more efficient and effective. Collecting basic information – such as the size and age of the home, the number of occupants, and existing energy systems – can help the EA know what is likely to be useful to take along or carry out research on a particular heating system, etc.

To support eventual measurement and evaluation, the person conducting the telephone call should aim to ask most or all of a standard set of questions, while also being flexible in relation to what the home occupant asks or brings up. ECs may do well to avoid asking questions that are very personal or probing too deeply by telephone, as it is a quite impersonal medium and typically the first direct interaction.

As noted in Chapter 2, ECs must consider all such information as personal and confidential. They must have systems in place to protect the data and be ready to assure households that they do. They should also inform people of how such data will be used and by whom, as well as how it will be safely stored and how long it will be retained.

Upon confirming that the householder understands what the visit will entail, a time should be set that is convenient for them.

Home Visits to offer advice and implement quick fixes

EAs making Home Visits should be well-trained in how to engage with people experiencing situations of energy poverty, including showing empathy for any sense of shame or embarrassment the person may express about their living conditions. They should also be aware of and respectful towards specific cultural and social norms (see Chapter 2).

In parallel with offering a friendly greeting, EAs should immediately introduce themselves, confirm that they are staff or a volunteer with the EC, and



TIP FROM CEES PARTNERS

IMPORTANT CONSIDERATIONS FOR SAFE AND EFFECTIVE HOME VISITS

As described in Chapter 3, many households facing situations of vulnerability have legitimate reasons to distrust agencies – whether government services on CSOs – offering anything for free. They may also be wary of strangers knocking on their door.

ECs should take, at minimum, the following steps to relieve such anxieties.

Conduct background checks of EAs and volunteers

The vast majority of volunteers offer their time to demonstrate social engagement in their local communities. Unfortunately, some people see opportunities to gain the trust of people who are vulnerable and may be easy to manipulate or take advantage of. ECs have a social and legal responsibility to carry out thorough background checks to ensure the safety of clients and of other staff or volunteers.

This can often be done by through online services. Allenergy, for example, uses Disclosure Scotland to carry out checks on all individuals interested in becoming EAs or working with clients in other roles. In Croatia, ZEZ was able to require all volunteers to show a valid Certificate of Good Conduct, issued by the Ministry of Justice, Public Administration, and Digital Transformation. This certificate serves as proof that the person concerned has not been convicted of crimes by a final and binding decision.

Make it easy to identify EC staff or volunteers

ZEZ prepared lanyards for EAs that hold an identity card with the organisation's logo and the photo and name of the individual. When setting up appointments for Home Visits, ZEZ described this mechanism for identification and advised householders to refuse entry to anyone not able or willing to show the ID card. ZEZ also communicated the name of the EAs who would be coming, so the householder would know who to expect.

Data collection during Home Visits

Not surprisingly, people can be very wary about sharing personal information that could be key data for an EA to collect – both to provide effective service and to evaluate the impacts of interventions. It can also be the case that collecting data takes a great deal of time while people look for paperwork such as energy bills. The pre-visit telephone call can be used to explain what information will be requested and why, as well as what purposes it will serve and who will have access to it (see Chapter 4).

Ensure the safety and well-being of EAs and volunteers

The health and safety of EAs and volunteers must be prioritised when making Home Visits. To the greatest degree possible, CEES Partners recommend having two people conduct any Home Visit. This can also have the advantage that one person can engage in conversation while the other carries out inspections and interventions.

Those making Home Visits should know that they have the right to decline to enter any environment that makes them feel unsafe. They should also be trained on how to politely – but firmly – extract themselves from situations that are beyond their capacity to manage. Finally, they should be reassured that they can hand the situation back to the EC to follow up with the client to address safety concerns or to explain why services will not be offered.



TIP FROM CEES PARTNERS

IMPORTANT CONSIDERATIONS FOR SAFE AND EFFECTIVE HOME VISITS (CONTINUED)

Create a risk register

ECs should carefully log the full details of all situations or settings that pose risks to EAs or volunteers. This might include a client's dwelling being located in an area that is unsafe for a woman to visit alone or a dwelling that is particularly unhygienic or unsafe because of old systems or unstable floors and walls. The risk could also be the dwelling occupant, if he or she displays some type of mental illness, an addiction to drugs or alcohol, or a level of anger at society that could be misdirected at the EA or volunteer. Keeping a such a register can be valuable to decision making if the person seeks help again in the future.

Make time and create mechanisms for EAs and volunteers to 'debrief'

ECs must inform those who will make Home Visits that they are very likely to encounter challenging and even disturbing situations. In turn, properly trained staff should be available by telephone during hours that Home Visits are being conducted, so they can intervene quickly if needed. They should also be available for individual or collective conversations to share experiences and discuss ways such circumstances might be avoided or better managed in the future. ECs should build time into the EA and volunteer schedules for such conversations, not treat them as an afterthought that can be requested on an 'as-needed' basis. As with a risk register, keeping a record of such experiences can be helpful for all parties engaged in setting up or executing Home Visits.

reconfirm that the householder agrees to proceed with the visit – once again describing what will take place. The EA should make a move to enter the premises only when specifically invited to do so.

Once the householder appears to be at ease, the EA can propose doing a 'walkthrough' of the house to check for problem areas and offer information or advice about what is needed to address them. During the walkthrough, the EA should clearly explain what can be done in the very near term (including during the visit) to improve thermal comfort or reduce energy consumption for little or no cost versus what will require substantial work and resources. This is important to establish realistic expectations and also inform householders about serious problems that are beyond the scope of the EC.

The EA should examine windows, doors, insulation, heating and cooling systems, and lighting and appliances for energy efficiency while also being on the look-out for signs of inefficiency – e.g. inadequate insulation, draughts, dampness and mould.

Throughout the assessment process, EAs should keep up a friendly chatter with householders, asking questions and practising active listening to elicit information about their energy use habits, challenges they face and any specific areas of concern.

EAs should pay particular attention to safety hazards – and prioritise them within the measures to be taken or advised. Examples include exposed wiring, gas leaks or structural issues. When such issues are noted, EAs should implement any measures that are immediately possible and ensure that householders fully grasp the seriousness of other problems that require professional intervention.

Based on the findings, EAs should develop a tailored set of recommendations for each household. This might include a mix of simple behaviour changes, quick fixes or information about what aspects represent bigger challenges. For the first two, EAs can demonstrate how to adopt new habits, undertake simple measures while on site (or schedule a return visit) or provide accessible and easy-to-understand information. For the bigger challenges, they can leave information about available grants and subsidies, or services offered by government agencies or other entities that can help the household implement the recommendations.



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Examples of Home Visit advice and interventions		
While far from exhaustive, the following list gives a few ideas about how EAs might use a 'three-pronged approach.' Behaviour change and Quick fixes can help people feel more comfortable or reduce their energy consumption. EAs should also be ready to inform people about how to address the Bigger challenges . These are likely to be more costly and may require the time and expertise of professionals. Often, tackling the bigger challenges is what will truly eradicate energy vulnerability. But smaller actions can be critical to help reduce impacts in the very near term – and thereby win the trust of occupants.		
Behaviour changes	Quick fixes	Bigger challenges
Windows		
<ul style="list-style-type: none"> Close curtains or blinds to reduce heat loss in winter and heat gain in summer 	<ul style="list-style-type: none"> Install weather stripping Place a rolled-up towel or old blanket on the window frame 	<ul style="list-style-type: none"> Replace single- or double-glazed windows with triple-glazed Replace wooden window frames with PVC
Doors		
<ul style="list-style-type: none"> Avoid leaving doors open for extended periods when entering or leaving Keep doors closed between heated and unheated areas 	<ul style="list-style-type: none"> Install weather stripping around door frame Install draught blockers at the bottom of doors Block draughts from keyholes or letter slots 	<ul style="list-style-type: none"> Replace ill-fitted doors Install an additional exterior door
Heating systems		
<ul style="list-style-type: none"> Maintain temperatures in individual rooms, according to how much they are used and for what purposes Avoid letting curtains or furniture cover radiators and block heat distribution Vent (or 'bleed') radiators annually to remove air bubbles that reduce water circulation 	<ul style="list-style-type: none"> Programme timers on heating systems so the temperature is a few degrees lower overnight and when away for extended periods during the day Clean or change air filters regularly to boost efficiency Lower the flow temperature on boilers by a few degrees to optimise cost efficiency 	<ul style="list-style-type: none"> Be smart about home renovations: properly insulate first, then choose the right size and type of heating system
Electricity savings		
<ul style="list-style-type: none"> Switch off lights and all appliances or electronics (TV, radio, etc.) when leaving a room Defrost freezers (ice boxes) when ice reaches a thickness of 3-5 cm, preventing effective cooling 	<ul style="list-style-type: none"> Use power bars to slash energy losses linked to devices that are on 'stand-by' 24/7 Replace standard incandescent bulbs with LED bulbs 	<ul style="list-style-type: none"> Replace old stoves with induction stoves, the most energy efficient Replace refrigerators >20 years old with a new one (energy class A+ or higher)
Water savings		
<ul style="list-style-type: none"> Turn off faucets while washing dishes, brushing teeth or shampooing hair Limit shower time to <5 minutes Choose showering over baths to save 135 litres on average 	<ul style="list-style-type: none"> Install aerators on faucets to reduce consumption by 50% Replace cisterns (hot water tanks) with a capacity of 7-9 litres with a 5-litre version 	<ul style="list-style-type: none"> Install a dishwasher of energy class A++; water savings will repay the upfront investment in 6-7 years

ECs must not underestimate the importance of 'leaving the door open' for follow-up calls or visits to practice energy solidarity in effective ways. For people with low energy knowledge or know-how, the initial visit can be overwhelming. They may also feel uncertain as to whether they are adopting new behaviours in the most effective way or nervous about implementing small fixes on their own.

Also, while a one-time intervention can be helpful in vital ways, for people who have been systematically marginalised within a community, it can feel like another organisation 'ticking the box' of having delivered a service they are obliged to conduct. ECs should be aiming to build engagement across the community, not just helping individual households.



TIP FROM ALIENERGY
BEING POLITE WHILE SETTING
AND/ OR RESPECTING
BOUNDARIES

Hospitality is a key feature of many European cultures. As such, EAs may find themselves constantly invited to enjoy a cup of tea and a piece of cake, join the family for a traditional meal, or accept a gift of home-made preserves in return for their trouble. This can be particularly true if the home occupant is someone feeling socially isolated.

ALIenergy allows EAs to use their own discretion, taking account of the situation and their own workloads.

Generally, however, EAs are advised to decline for various reasons. First, they should avoid taking anything of any value from a household in a situation of energy vulnerability. Even though the cake may have been baked or purchased specifically for this visit, it may be that purchasing it or the ingredients strained the household food budget. Gently declining may mean the family can later enjoy an unexpected treat.

Graciously turning down a cup of tea can be as simple as saying, "Thank you for the very kind offer, but I've just had one." Declining can also be a mechanism to avoid having to later ask to go to the toilet, particularly if the level of hygiene seems uncertain.



INSPIRING PRACTICE
TEMPERATURE AND HUMIDITY MONITORING
DURING HOME VISITS

On the Isle of Skye in the West of Scotland, Portree is an area with very high levels of energy poverty.

The Lochalsh and Skye Housing Association (LSHA) is an independent, non-profit housing organisation set up to develop, manage and maintain rental housing. In recent years, the LSHA has been offering in-house Energy Advice Services to tenants (and the wider community) and adopting an 'Energy Carer' approach. Under this approach, the association collaborates with tenants to explore and understand five elements that influence (for better or worse) the achievement of affordable comfort: fabric, ventilation, heating, people and energy tariffs.

Initially, the approach involves systematically gathering relevant data through meter readings and regular stock surveys. When conditions warrant it, EAs install special devices to monitor (over a period of several days or weeks) room temperature, relative humidity and energy consumption.

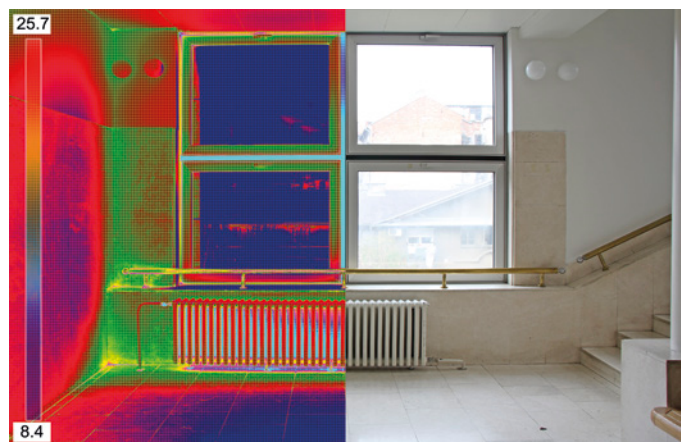
Typically, the EA also uses a thermal imaging camera to take a photo of the dwelling and show how problem areas correspond to the data visualisation. One example might be where windows and poor insulation lead to excess heat loss in the vicinity of radiators. Another might be that poor ventilation in the bathrooms shows up as spikes in moisture build-up in the morning or evening, when family members take showers.

As EAs working for the LSHA have detailed knowledge about the energy consumption trends of tenants, when carrying out in-depth investigation of a dwelling they can quickly tailor any interventions or advice.

Key to the Energy Carer approach is the combination of EAs being trained to have a friendly demeanour and being supported by communications materials that present findings in a simple manner. Also critical is being allotted the time needed to understand individual circumstances and preferences.

When EAs identify a major problem – such as mould and humidity – that cannot be resolved by either party alone, the LSHA quickly establishes a partnership between the landlord and the tenant to collaborate as needed.

In turn, the LSHA uses the data collected and lessons learned from survey and monitoring activities to help inform its own policies and decisions around appropriate heating and ventilation solutions.



Thermal imaging is an effective tool to help people 'see' where heat is being generated (red areas) and lost (blue areas). Photo: ©iStock / Ivansmuk



Case study. ZEZ achieves success, despite a difficult context

ZEZ faced multiple challenges in carrying out its CEES pilot, not least the fact that Croatia has not yet defined energy poverty or set policy frameworks through which it should be addressed. Also, the public is not familiar with the concept, even though many people expect to feel cold inside their dwellings and to struggle to pay energy bills. It is worth noting as well that ZEZ is not an energy supplier, so does not have any direct connections to customers.

Still, ZEZ set the ambitious aims of trying to help 250 energy-vulnerable households through Home Visits – and of seeking public and private corporation support to finance the initiative.

To identify households, ZEZ collaborated with organisations such as the Red Cross and the government's Centers for Social Welfare to distribute information on how to register to receive a free Energy Efficiency Kit (described earlier). It also distributed flyers in public spaces that the elderly (who are the most vulnerable) often visit, such as public libraries, tram stations, pharmacies, health centres, and public kitchens.

Word soon got around, attracting media attention. ZEZ was invited to present on a few radio shows and eventually on 'Good Morning, Croatia,' a popular morning TV talk show. After the 10-minute report, ZEZ's phones rang for two days straight and all registrations were booked.

In terms of connecting with the target groups, the experience of ZEZ underscores the importance of strong partnerships and community engagement and of making information straightforward and relevant to the audience. ZEZ concentrated on making sure people would know what the Energy Efficiency Kits contained, how to register, and how and when the kits would

be delivered. For registration, providing a phone number was critical, as many people the target age group are not comfortable with digital technologies and may not have computers at home. In terms of delivery, setting an exact date and time and providing information on how people would be able to identify the professionals coming to the door (i.e. an ID badge with their names and the ZEZ logo) were critical to making people feel at ease.

In parallel, training the Energy Advisors (EAs) who would do Home Visits was crucial. Beyond equipping them with technical skills, ZEZ covered topics such as personal safety of both the householders (e.g. through ID badges) and the EAs themselves (by providing emotional support). As many of the EAs were volunteers, ZEZ found that flexibility and thorough training were key to sustaining motivation and reliability.

ZEZ launched a micro-donation scheme to raise funds from individuals. Partnering with the Solidarna Foundation – a nationally, well-trusted foundation – proved particularly effective. In parallel, it sought to engage with energy suppliers to implement a micro-donation scheme on their customers' energy bills. But the processes involved were more complicated than the suppliers were willing to take on.

The experience of ZEZ highlights the importance of understanding the target group's needs, building robust partnerships, and remaining adaptable to overcome implementation challenges. One example was in logistical planning, including finding storage space for Energy Efficiency Kits and managing fluctuating product availability and price.

Local energy production, self-consumption and supply

One of the most direct ways for ECs to help households that are struggling with high energy costs is by increasing the accessibility of locally-produced, clean energy at reduced or subsidised rates. Several mechanisms now exist within EU

energy markets through which ECs can practise energy solidarity in this way. As noted below, however, the material costs and human resources requirements are heavy, and the processes are not easy to replicate.

According to EU law, ECs can engage in several activities relevant to energy solidarity, including

ASSESSING YOUR CAPACITY – at a glance

Material costs	Human resources	Ease of replicability
\$\$\$		
Installing renewable energy systems is costly. It typically requires substantial upfront investment, which implies first developing a solid business model.	Establishing ECs that will produce and/or supply energy requires a wide range of expertise from technology to policy to financing. All areas require substantial time investments, individually and collectively.	EC participation in EU energy markets is relatively new and evolving rapidly. National transposition of EU directives is advancing at different paces and leading to diverse parameters. ECs may have to significantly customise models that work in other contexts.



production, self-consumption and/or **supply of renewable energy**. Among CEES Partners, Repowering London and ZEZ are energy producers, Enercoop is an energy supplier, and Coopérnico is active in both streams. Such distinctions are critical to understand for EC operations generally and for engaging in energy solidarity mechanisms. Within the frameworks of relevant EU directives, national and local laws and regulations ultimately establish the conditions under which an EC can produce energy, and then share and/or sell it. Often, ECs need to acquire different permits or licences to be a generator and/or a supplier.

Generally, ECs have three options for the energy produced. They can: a) sell it into the market; b) supply it directly to EC members, effectively combining production and supply activities; or c) use it for collective self-consumption and/or energy sharing.

Whether a certain activity is technically and financially possible – and the extent to which it will generate social benefits for vulnerable households – is closely linked to three main factors: a) local and/or national legal and regulatory frameworks; b) the business model of the EC; and c) the willingness of members to build energy solidarity into the EC's vision and mission.

ECs need to carefully consider their options and pick the best fit, at the earliest possible stage of planning a new project. Not surprisingly, there are myriad technical details and potential hurdles to consider with regards to each activity, such as a lack of appropriate installation sites, difficulty obtaining planning permits, constrained options for grid connections, and difficult and complex administrative procedures.



TIP FROM CEES PARTNERS PRACTISING ENERGY SOLIDARITY EFFECTIVELY, BY CHOICE OR OBLIGATION

ECs that want to integrate energy solidarity mechanisms into their vision and mission need to consider how energy poverty is defined within local and national contexts and how they will identify and engage with households that meet the criteria (see Chapter 4). In geographic areas with high rates of low-income families, ECs may also need to set their own criteria for how they will use available resources to first support the families who will benefit the most.

Laws and regulations also determine whether energy producers and suppliers, including ECs, have legal obligations towards low-income families. In France, for example, all energy companies are obliged to promote energy efficiency among energy-poor households and to direct a share of profits into support schemes for home renovations.²⁰ Large energy companies with high profit margins may have an extensive team that manages these obligations. For Enercoop, which has a much smaller customer base and workforce, and is also committed to providing electricity at the lowest possible cost, meeting these obligations is a much heavier 'burden' in relation to available resources.

As the concept of ECs may be completely new to them, target households may have many questions and concerns that need to be addressed. ECs need to create easy-to-understand communications materials, possibly in multiple languages that reflect the demographics of the community they aim to serve. The content should be clear about how joining as a member or beneficiary can help reduce their energy bills while also explaining what they need to do (e.g. pay a membership fee and sign a contract, signal the intent to switch suppliers). ECs should also communicate the criteria used to determine whether such costs might be reduced or waived for households in energy vulnerability. Mechanisms by which such households can access other types of help (e.g. acquire a Cosy Kit or have a Home Visit) should also be clear. It may also be the case that to benefit from flexible tariffs, households will have to let the EC install a smart meter, which some people distrust.





TIP FROM CEES PARTNERS
PRACTISING ENERGY SOLIDARITY
EFFECTIVELY, BY CHOICE OR
OBLIGATION (CONTINUED)

Often, a key 'selling feature' of ECs is a commitment to better services or, indeed, the opportunity to become a decision maker through membership. Following through on these offers is critical to maintaining trust and engagement.

ECs should not underestimate the time and effort required to onboard members and participants. It may be that a significant number will need one-to-one support to sign up and set other things (such as switching suppliers) in motion. ECs should be sure to provide a range of ways that interested parties can make contact, such as through forms on a website, by email or by phone.

On the technical side of being an energy producer or supplier, ECs need to monitor their systems and check in with participants to troubleshoot any issues that arise. This should include whether members and customers are realising the anticipated savings on their energy bills and, if not, assess whether a Home Visit or other intervention could help. Keeping accurate data to demonstrate reduced consumption or savings on energy bills can be extremely helpful for future promotion and onboarding more people.

As suggested in Chapter 4, to facilitate the process of identifying households that might benefit from the plans on offer, ECs may want to consider the benefits (and potential drawbacks) of joining forces with local partners that are already trusted actors in the target community. These might include existing community support initiatives, housing providers or local authorities.

It goes without saying that any costs related to technical and non-technical matters of practising energy solidarity need to be properly reflected in the EC business plan and annual budgets.

Short summaries below highlight existing business models for energy production, self-consumption and supply through which ECs can deliver social benefits to vulnerable households. Four 'Inspiring Practices' illustrate creative approaches for embedding energy solidarity into EC structures and operations. As this is a rapidly evolving landscape, this section does not aim to describe all emerging possibilities.

Production of renewable energy to sell to the grid or to a supplier

To incentivise investment in renewable energy, many EU Member States introduced support schemes to ensure a reliable return on investment. This often took the form of feed-in tariffs (FiTs) or feed-in premiums (FiPs), in which the government sets a fixed price that producers will receive from utilities or suppliers when the energy produced is sold into the grid. Knowing that they would receive a guaranteed price for each unit of energy they expected to produce allowed ECs to develop viable business models.



© iStock / Blueringmedia

This approach was effective for boosting shares of renewables in energy systems, including shares produced by ECs. Over time, however, it became clear that setting fixed prices for renewable energy – particularly within electricity markets that are otherwise liberalised and in which prices change constantly – had some drawbacks. At times when a large gap emerged between market and set prices, governments often had to pay the difference to renewable producers, making the schemes costly.

Increasingly, energy regulations are being adjusted to replace such fixed remuneration schemes with renewables support schemes based on competitive bidding (e.g. tenders and auctions). Unfortunately, ECs face significant hurdles in accessing these support schemes. Complex procurement rules and the focus on securing the best value at the lowest price make it difficult for ECs to compete against larger commercial actors.²¹

ECs that produce energy can also sell to an external supplier, which then sells it on the wholesale market. In some cases, suppliers set the price at which they are willing to compensate production; in others, ECs and suppliers negotiate the price.²¹

Any profits an EC makes from selling production (whether to the grid or to a supplier) are typically

20. <https://energy-poverty.ec.europa.eu/observatory/publications/epov-member-state-report-france>

21. [Energy Communities Repository \(2024\). Barriers and Action Drivers for the Development of Different Activities by Renewable and Citizen Energy Communities.](#)



INSPIRING PRACTICE

IN FRANCE, 'PREMIUMS' HELP FINANCE THE CLEAN ENERGY TRANSITION

In 2015, the French government introduced a law on the 'energy transition for green growth'. Embedded in the law is a provision by which the government pays a premium (essentially a public support scheme) to renewable energy producers, based on the sale of energy they produce into the energy markets. (Typically, producers sell electricity generated on the market, either directly or through an operator called an 'aggregator'.)

This premium is proportional to the energy produced and calculated as the difference between a reference tariff (comparable to the current feed-in tariff) and a reference market price. Much like a feed-in tariff, it aims to provide producers with a level of remuneration that covers the costs of their installation while ensuring a reasonable return on their investment.

In 2019, France implemented additional remuneration for large renewable installations. This prompted Enercoop to launch tripartite contracts with producers and aggregators to help guarantee the financial basis for projects that would use the premium to implement local actions to support the energy transition.

To better share value and support such activist projects (in partnership with its producers), Enercoop adds a 'competitiveness premium' to these additional remuneration contracts. In turn, it directs these premiums towards citizen energy transition actions. For Enercoop, this supports three overarching aims: encourage producers to engage in their local areas; strengthen Enercoop's

territorial presence by enhancing its impacts through local actors; and promote citizen participation in solidarity projects.

Effectively, Enercoop is using the premium to engage producers in its solidarity and ecological values and ambitions. By leveraging the legal mechanism (i.e. additional remuneration), Enercoop is guaranteeing and enhancing its impact.

Ultimately, Enercoop seeks to incorporate these premiums to producers into its CSR commitments, rather than using them only in additional remuneration contracts. This requires:

- Revising the eligibility criteria for these contracts (types of actions, contracts, duration, volume, etc.).
- Proposing simplified operational management and revising the contractual framework.
- Ensuring quantitative and qualitative monitoring.
- Defining the available human and financial resources for premiums..
- Rethinking the promotion of actions in communication and/or CSR.

For more information, see: <https://www.ecologie.gouv.fr/dispositifs-soutien-aux-energies-renouvelables>

distributed among its shareholders, who may take the decision to re-invest in expanding the project or launching another one. Once the upfront investment has been recovered, the higher revenues may open up opportunities to convince members to direct funding towards energy solidarity projects. More information on and examples of steering EC revenues to boost social impacts are covered in Chapter 6.

Production of renewable energy for self-consumption

Self-consumption refers to the aim of producing energy that will be used by the owners of an installation and/or by dwellings and other energy users in the immediate vicinity. The European Renewable Energy Directive defines two categories of self-consumption:

- **renewables self-consumers** refers to final customers who generate renewable electricity for their own consumption and may store or sell any excess. For non-household self-consumers,

these activities must not be their primary business or professional focus.

- **jointly acting renewables self-consumers** are groups of at least two individuals who cooperate to generate renewable electricity and are located in the same building or multi-apartment block.

As legislation on self-consumption varies across Member States, ECs have developed diverse business models that are aligned to either category, within relevant to national or local contexts.

The Inspiring Practice of Repowering London demonstrates the range of actors that may need to be involved to manage both technical and legal aspects of establishing an EC for self-consumption.

For ECs to facilitate self-consumption, one option is to install small solar PV systems on the roofs of individual houses, matching the size to the family's energy needs (as in the Inspiring Practice of ECoOB). More often, ECs will look for an appropriate location to install a larger PV project (e.g. on the



INSPIRING PRACTICE

REPOWERING LONDON AND ENERGY LOCAL ROUPELL PARK

In 2013, with the support of Repowering London, a local community group in South London set up a cooperative to install solar panels on a number of apartment blocks on the Roupell Park estate.

Six years later, a consortium took up the challenge of using new smart technologies to enhance the existing scheme and allow residents of the estate to benefit directly from electricity generated by the solar panels. The consortium included: Repowering London; the Brixton Energy Solar 3 cooperative; Energy Local CIC; Bioregional; Connected Response; and Octopus Energy, who collaborated to develop the [Energy Local Roupell Park project](#). This small pilot uses Energy Local CIC's model for Energy Local Clubs alongside supplier arrangements with a licensed energy supplier, Octopus Energy. The Energy Local Club is structured so that project participants and the local energy generator (Brixton Energy Solar 3) set tariffs through a democratic vote.

Remarkably, the business model enables estate resident to purchase solar-generated electricity for 6p/kWh – compared to 35p/kWh for grid electricity. On average, participants are saving 25% on their energy bills.

Repowering London has also developed personalised reports to help participants understand their energy and cost savings, and to show how shifting energy consumption to when the sun is shining can deliver even greater savings.



The aim of Energy Local Roupell Park is to benefit participating members through lower energy tariffs (rather than others such as energy company shareholders). The vision is that even people who live on an estate such as Roupell Park can access sufficient, affordable energy to meet their own needs while supporting the transition to a low-carbon economy.

roof of an apartment block or school or in a field) or a wind turbine (in rural areas). In parallel, they will develop a base of members (i.e. consumers) in the area whose energy needs (some or all) can be met through the production (i.e. seeking to match demand and supply).

In the activities described above, ECs effectively take on the role of investing and installing renewable energy on behalf of their members and/or other beneficiaries. Typically, the EC handles technical, operational and administrative tasks. Enhanced energy security at the local level is a key benefit of these approaches. By guaranteeing sufficient production for self-consumption by its members, the EC reduces their risk of exposure to volatile prices on the electricity market. In fact, many EC members have been well protected from price fluctuations linked to the ongoing energy crisis.

If the installation generates more energy than members need, the EC typically has the right to sell the excess into the grid and retain any revenues





INSPIRING PRACTICE
'SUN BUILDERS' TO THE RESCUE!

In the Flemish region of Belgium, [Energiecoöperatie Oost-Brabant](#) (ECoOB) has launched the Zonnebouwers+ (Sun Builders) project to provide low-cost renewable energy to households in vulnerable situations.

By collaborating with local social services, ECoOB identifies low-income households that do not have the financial means to invest in renewable energy. In turn, ECoOB contacts the households and offers to install solar panels at no upfront cost. Rather, ECoOB covers the initial investment and retains ownership of the installation for up to 18 years.

During this period, households pay a fixed tariff of €8.00 per month (for an average household) to consume the electricity generated on their own roof. Importantly, this is lower than the Belgian social tariff.

Meanwhile, ECoOB collects income from both the monthly fees and by selling excess power to the grid. It also handle all technical and administrative tasks.

At the end of the 18-year period, ECoOB donates the installation to the household.

Eventually, ECoOB aims to extend its programme to renters, providing access to affordable renewable energy through energy sharing. At present, Flemish legislation on energy sharing makes this model costly and burdensome, limiting its potential.

realised. In some cases, ECs have chosen to provide part of the produced electricity for free to energy poor households. The latest revisions to the Electricity Market Design include new provisions defining the activity of energy sharing (see box). Such provisions will have to be transposed at the national level, which is expected to bring changes and additions to existing national laws that regulate the activities of self-consumption and collective self-consumption (as well as aspects such as virtual net metering, virtual net billing, peer-to-peer trading and so on).

Energy sharing as an emerging approach to energy solidarity

The recently revised (but yet to be officially published) Electricity Market Directive includes (in Article 2(10a) and Article 15a) provision for Member States to facilitate the concept of **energy sharing**.

The Directive defines energy sharing as:

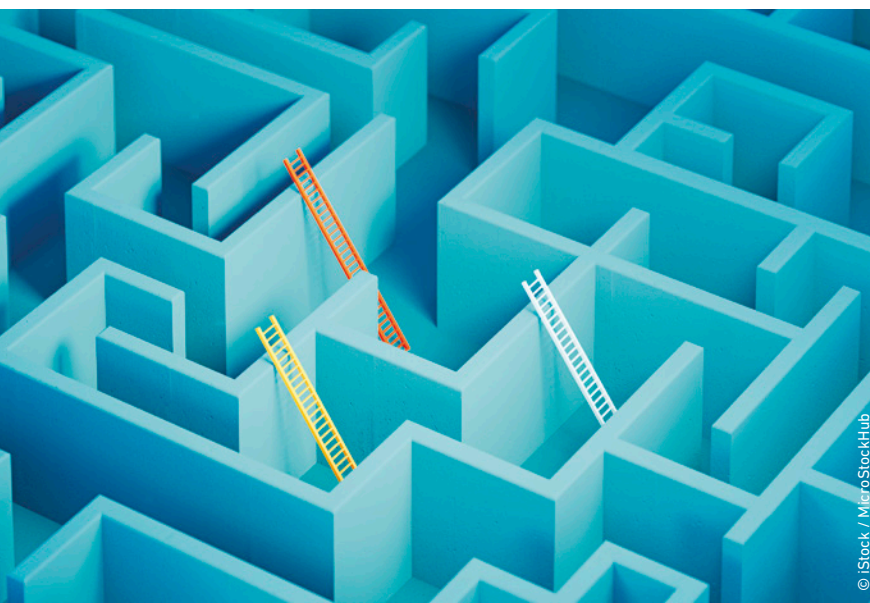
"self-consumption by active customers of renewable energy either:

- a) generated or stored offsite or on sites between them by a facility they own, lease, or rent in whole or in part; or
- b) the right to which has been transferred to them by another active customer whether free of charge or for a price."

The Directive reform encourages energy sharing schemes with a special focus on energy poor and vulnerable households. In fact, it requires Member States to ensure such households can access energy sharing schemes (e.g. through financial support measures or production allocation quotas). It also states that projects owned by public authorities could make shared electricity available to vulnerable or energy poor households (accounting for at least 10%, on average, of energy shared).

A fundamental change related to the potential of energy sharing is that it becomes possible to self-consume jointly produced energy without having to acquire a supply licence. This substantially reduces administrative burdens and associated costs. The Inspiring Practice of Hyperion demonstrates how ECs can design self-consumption schemes to benefit vulnerable households.

Currently, however, ECs that engage in energy sharing face multiple obstacles that are diverse in nature. Two overarching barriers include: a) a lack of information and low awareness about energy sharing; and b) conceptual confusion between ECs as an organisational concept and



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INSPIRING PRACTICE

HYPERION OFFERS FREE ELECTRICITY TO HOUSEHOLDS IN ENERGY POVERTY

With 26.3% of its population unable to afford sufficient energy for health and well-being, Greece has the third-highest rate of energy poverty in Europe.

[Hyperion](#), a Greek not-for-profit EC, promotes shifting to a social and solidarity economy by prioritising social and environmental goals over profit. Their first completed renewable energy project is a 500 kWp solar park at which all energy produced is used for collective self-consumption, not for selling to the grid. The installation is expected to be operational for the next 25 years.

Under a virtual net metering scheme (a form of energy sharing), energy produced on site is divided and metered for all members (i.e. deducted from the bills of the participants), over a period of three years. The regulatory framework also allows that part of that energy be given for free to energy-poor households.

Hyperion partnered with two municipalities in the Attica region (surrounding Athens) to identify nine vulnerable households and include them – for free – in the collective solar park.

According to Hyperion staff, identifying vulnerable families and gaining their trust have been substantial challenges. Such families have been very hesitant to join a scheme – even a self-consumption collective – in which they will receive ‘free’ energy without needing to do anything. By partnering with municipalities, Hyperion tapped into a trusted intermediary that could engage and inform the households on its behalf.

Notably, Hyperion also provides free electricity to two social solidarity organisations in the area, a migrant cultural centre and a social kitchen.

Hyperion’s aim is to keep developing long-term solutions to energy poverty. Recently, it established a dedicated Energy Poverty Working Group through which EC members and the Board of Directors co-create solutions.

energy sharing as an activity. On the more technical side, main challenges include (among others): difficulty in obtaining grid access; a lack of clarity and transparency regarding the duties and roles of network operators; a lack of necessary IT infrastructure to handle data; and the ongoing need to organise energy sharing with a supplier.²² A key role of the European Commission is to provide guidance on how to ensure a level playing field for ECs that want to engage in both self-consumption and energy sharing. The guidance document is also expected to resolve confusion as to the various terms being applied in the evolving frameworks and market structures.

In the Inspiring Practice of La Tonenca Sccl (Spain), partnering with the municipality enables the EC to more effectively combine energy sharing and energy efficiency, and thereby reduce reliance on social services.

22. [Energy Communities Repository \(2024\). Barriers and Action Drivers for the Development of Different Activities by Renewable and Citizen Energy Communities.](#)



INSPIRING PRACTICE

THE WINNING COMBINATION OF CLEAN ENERGY AND IMPROVED EFFICIENCY

Established in May 2022, [La Tonenca Sccl](#) is a non-profit EC in Tona, Spain. One of its key aims is to reduce energy injustices in the municipality by developing renewable energy installations and sharing the electricity with people in situations of vulnerability. La Tonenca Sccl built a first solar PV installation (30 kWp) with the aim of allocating one-third (10 kWp) of generation to such families.

To achieve this, La Tonenca Sccl collaborates closely with the municipality’s social services to define criteria for who would be eligible. The focus is on helping those who struggle to meet official criteria for energy aid and whose financial situation would improve significantly with access to free local, renewable energy – thus reducing their reliance on social services. To date, they have identified 42 families who are eligible.

Ultimately, La Tonenca Sccl and the municipality aim to reduce energy costs for these households through a two-pronged approach. In addition to providing free or low-cost locally produced electricity, the municipality will help these families to improve the energy efficiency of their homes.

Retail supply of renewable energy

As an alternative to selling the renewable electricity they produce to the grid or making it available through energy sharing or self-consumption, ECs can opt to supply it to their members by becoming a licensed energy supplier themselves. By offering the unique service of supplying their members with energy (typically, electricity or heat), an EC can shield them from price volatility on the wider market. This is especially true when balancing the installation's production capacity with the energy demand of members or clients.

In Belgium, the Flemish cooperative Ecopower is licensed as both a producer and supplier of renewable energy. Having taken the decision to offer electricity at cost, Ecopower was able, in the first months of the energy crisis in 2021-2022, to shield its clients from skyrocketing prices. Such benefits are particularly interesting for those groups that are especially vulnerable within current energy systems.

ECs that are energy suppliers can also decide to offer special tariffs for vulnerable customers or build energy solidarity mechanisms into their supply activities (see the example of Enercoop and *Énergie Solidaire* using on-bill micro-donations in Chapter 6).

The role of ECs as suppliers has become particularly relevant under the current energy price crisis, which has prompted many commercial energy suppliers to stop offering fixed price contracts to their customers. Instead, they charge the market price plus a profit margin. This allows more flexibility in relation to market volatility but can lead to high prices for consumers.

Unfortunately, ECs seeking to engage in retail supply still face many barriers. Typically, the financial requirements are heavy and

administrative processes for obtaining a supply licence are complex. Additionally, a high level of bank guarantees is required to operate on wholesale markets.²³

Shared and Supported Self-Renovation (3SR)

Without question, deep renovation of old homes that lead to excessive energy consumption is the most effective means to eradicate energy poverty. It is also complex, costly and difficult to implement.

While the tendency is to think of ECs as energy producers and/or suppliers, recent EU directives have a broader definition and recognise community approaches to energy renovation as an important mechanism for reducing energy injustices.




Shared and Supported Self-Renovation (3SR)²⁴ is a well-developed approach that provides technical and social support for people living in poor housing conditions. The vision of this approach, which is being practised by more and more entities across Europe, is "to improve the quality of life and living conditions of people suffering from poor housing, while keeping in mind a great awareness of the architectural heritage and ecological qualities and merits of the existing buildings."

The approach is has been in place since 2013, and is currently led by [Humanity Earth Life Population Solidarity](#) (HELPS) and [Hands for Homes](#), a network of NGOs. It is actively practiced in France ([Les 7 vents, Enerterre](#)); Greece ([Mediterranean Centre for Environment](#)); Italy ([Associazione delle Città della terra cruda](#)); and Spain ([Taph Taph](#)).

23. [Energy Communities Repository \(2024\). Barriers and Action Drivers for the Development of Different Activities by Renewable and Citizen Energy Communities](#)

24. Additional information can be found in the [HELPS Project Guide](#).

ASSESSING YOUR CAPACITY – at a glance

Material costs	Human resources	Ease of replicability
		
<p>Substantial costs will be incurred for materials, equipment and safety measures throughout the entire project. The homeowner is responsible for much of the costs but often has limited resources.</p>	<p>Substantial staff resources will be required across the entire process, from organisation to execution of the project. Execution of the work also relies heavily on the good will of volunteers.</p>	<p>Three key challenges make 3SR difficult to replicate: a) each house is unique, requiring customised works; b) traditional building methods sometimes make it difficult to implement modern renovation solutions; and c) some are under 'heritage' protection, restricting what works can be done.</p>

Importantly, 3SR is not a charity or a hand-out; rather, it enables householders to become actors in the renovation works and empowered through learning and doing.

More traditional ECs may not want to add energy renovation work to their services but could be well placed to collaborate with actors in the renovation sector. Making homes more energy efficient reduces the level of energy they need to consume, often increasing the share that can be supplied through locally produced clean energy that is more affordable to the household.



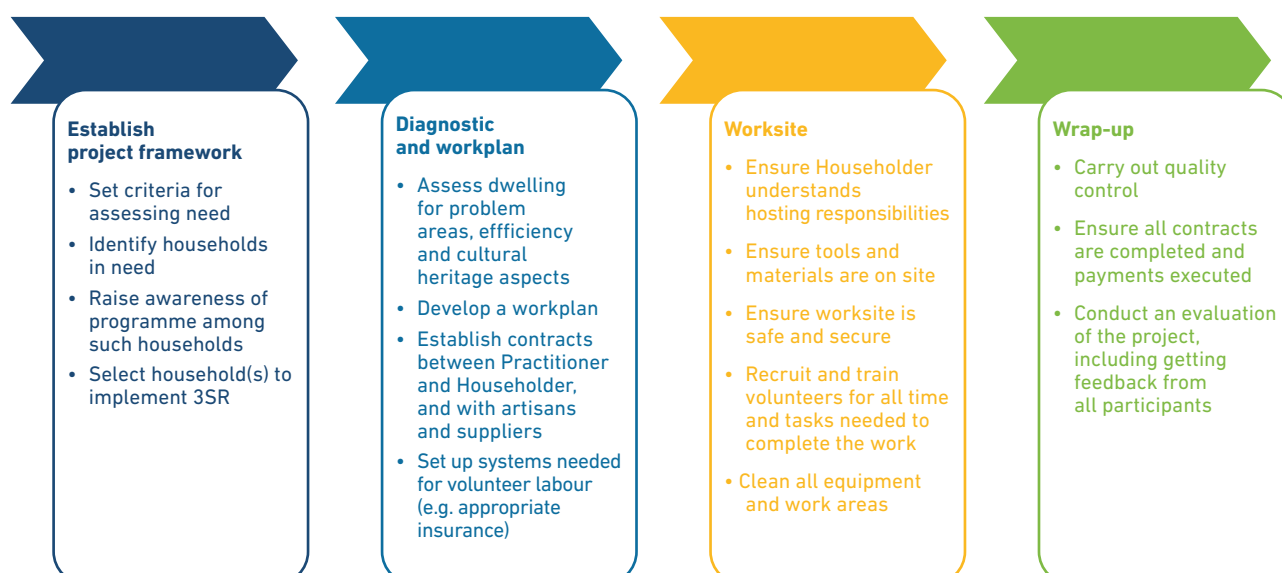
Element	Description
Shared	<p>Reflects two aspects of 3SR projects:</p> <ul style="list-style-type: none"> • a group of volunteers is recruited to assist on each project, and • usually, each household that receives assistance from volunteers is expected to volunteer in other projects to 'return the favour' <p>This aims to build a 3SR culture into local communities to enhance social impacts and keep the associations or organisations dynamic.</p>
Supported	<p>Reflects the mechanism by which a 3SR project is validated in that a certified renovation professional (often referred to as the 'Practitioner', 'Expert', or 'Artisan') oversees all aspects of the work. This begins with the critical first step of diagnosing what works are needed, which work requires the engagement of other professionals and which can be done by trained volunteers.</p>
Self-renovation	<p>Reflects that, ultimately, 3SR projects are 'owned' by the householder, who engages most closely with the Practitioner and also serves as 'host' to the volunteers.</p>

Phases of a 3SR project

Typically, a 3SR project is carried out over four stages. At the outset, it is important that householders (who may be referred to as 'Beneficiaries' or 'Project Owners') understand the full process may take one to two years, from first

interaction to finalising the renovation work. This is not unusual for deep energy renovations and does not suggest that 3SR is more cumbersome or slower than other methods.

Householders also need to understand the various actors who will be involved and their diverse



competencies, as well as their own relation to each group. While the composition of the team can vary from project to project, several of these relationships imply specific responsibilities and have legal implications.

Key competencies across 3SR implementation

Within the 3SR framework, entities that oversee works are typically known as 'Project Operators'. As such, they need to be knowledgeable regarding labour law, building/construction legislation (including risk prevention or safety and security), and insurance requirements, among other aspects of an effective legal and operational framework. They are responsible for finding the full range of human resources needed to carry out the work.

Generally, 3SR Project Operators identify five key competencies for a successful project, which may be split across distinct jobs or staff duties, or even carried out by consultants and sub-contractors. Alternatively, depending on levels of expertise, some roles may be combined and carried out by a single individual or entity.

- **Promoting 3SR or serving as an ambassador.** The person fulfilling this role the 'Project Promoter' role (usually staff of the Project Operator) must have in-depth knowledge of the practice, including its advantages, potential risks and issues that may arise. It also requires understanding who the stakeholders are and having and/or establishing an appropriate network in the local community.
- **Identifying potential beneficiaries and accompanying them throughout the process.** This role, known as the 'Facilitator', is responsible for establishing contact with households that express interest in 3SR and assessing their eligibility. In effect, the Facilitator handles the 'upstream' aspects of preparing a 3SR project. A key aspect of this role is building and maintaining trusting relationships among all parties as the project progresses. Because of the need to span both building knowledge and personal relationships, this person is sometimes referred to as the 'Socio-Technical Facilitator'.
- **Providing technical analysis, assessing feasibility, and planning for the worksite (including materials needed).** This role is usually taken by a building or renovation professional (the 'Practitioner') who also understands the 3SR process. The Practitioner may be an architect, engineer or certified

construction/renovation contractor. Often, this competency is covered by the Practitioner and the Facilitator together, who will analyse the home and develop a workplan based on technical needs and any constraints identified (e.g. heritage status). In turn, they will estimate the workers and skill sets required to carry out the project and which tasks can be completed by volunteers, as well as the time required for appropriate training.

- **Facilitating the participative worksite.** The main role of this individual (the 'Worksite Facilitator') is to recruit and manage volunteers, which involves communicating with them in advance of and throughout the project. The role also holds responsibility for relevant paperwork (such as becoming a member of the cooperative, insurance, etc.).
- **Organising and executing the participative worksite.** This role (the 'Worksite Team Leader') involves ensuring the worksite is ready for volunteers on each workday (e.g. the right materials and equipment are in place; any necessary safety steps are taken), as well as assigning and overseeing their tasks. As such, it requires a high level of technical knowledge and the ability to communicate clearly to transmit key information and demonstrate how to do specific tasks. Ultimately, the Worksite Team Leader is responsible for the quality of the work carried out by volunteers.

Identifying eligible households

To effectively target households in situations of energy vulnerability with a 3SR approach, ECs need to fully understand how energy poverty is defined in their national and/or local context. This can help in developing quantitative and qualitative indicators to characterise different households and assess their level of need. In France, where Les 7 vents operates, for example, a quantitative measure is the 'energy burden' (*taux d'effort énergétique*), measured as having to spend 10% or more of disposable income on domestic energy bills. A qualitative indicator is 'having suffered, in the home, from the cold or heat for 24 hours straight within the last year'.²⁵

Once the indicators for identifying eligible households are determined, ECs should be aware that such households are unlikely to step forward to seek assistance. Also, they may not be aware of 3SR approaches or operators. As such, ECs may need to initiate engagement through different

25. https://int-onpe.ademe-cloud.fr/definition_indicateurs/definition_des_indicateurs

mechanisms such as: direct contact (e.g. door-to-door campaigns); word-of-mouth (encouraging trusted neighbours and past Beneficiaries to bring up the topic); or promoting volunteering (by participating in one 3SR project, potential Beneficiaries may gain confidence in the process).

To raise public awareness of 3SR generally, ECs might run advertising campaigns or participate in relevant events. Les 7 vents finds they are more likely to receive requests about energy efficiency, which creates opportunity for their Energy Advisors (EAs) to explain the 3SR approach while conducting a Home Visit. If the family expresses interest, the EA then connects them to the Facilitator.

As with other energy solidarity measures, ECs – particularly those that do not typically carry out renovations – might find it more efficient and cost-effective to establish a referral network and train other actors to introduce the basics of 3SR when discussing other services available to households in vulnerability (see Chapter 4). Housing authorities, non-profits associations, social services and municipalities are examples of stakeholders that could direct people towards 3SR services.

Regardless of how contact is established, the next step is usually an informal phone call or in-person conversation. During this conversation, the Facilitator seeks to ensure that householders understand the fundamental elements of the 3SR approach. They also gather information about the dwelling, the needs and desires of the householders in relation to improving their living environment, and their capacity (financial and otherwise) to engage in 3SR.

If the Facilitator deems the home and the householders are a good fit for 3SR, a more formal process can begin. Typically, this involves three phases:

- **Phase 1:** Development and support for the project
- **Phase 2:** Organisation and preparation of the collaborative worksite
- **Phase 3:** Completion of the collaborative worksite

Phase 1: Before self-renovation begins

Once a potential household has been identified for 3SR, assessing the feasibility of a project is the critical first step. The assessment is based on analysis of factors such as: state of the dwelling



TIP FROM LES 7 VENTS MOTIVATION A KEY FACTOR FOR 3SR SUCCESS

Within French legal entity structures, Les 7 Vents exists as a 'public service provider', a status that makes it impossible for them to 'advertise' the availability of 3SR services. Instead, within the CEES Project, they selected households based on information acquired when people called regarding energy advice services. In some cases, households also spontaneously asked for information about how they could undertake some aspects of renovating their home.

Les 7 vents prioritised households that showed strong interest in being actively involved in their own renovations, as high motivation is vital to a successful 3SR project.

and level of renovation needed; anticipated costs; financial resources of the occupant; availability of state aid or other financial support; availability of experts or artisans; and availability of equipment and materials.

Typically, following a telephone call, the Facilitator will arrange a home visit. Ideally, this individual will have strong interpersonal and pedagogical skills complemented by a relatively high level of technical knowledge about buildings. The purpose of the visit is three-fold. First, to again make sure the householder is fully informed about the 3SR approach, including legal considerations and their obligations as Project Owners. Second, to identify (somewhat informally) the pathologies (assets and liabilities) of the home. And third, to gather information about the occupant's needs and desires.

During a second visit, usually involving both the Facilitator and the Practitioner, the latter will use their deeper technical expertise to carry out a more detailed diagnostic of the dwelling, including considerations of its immediate environment. The 3SR team will also gather more information about the residents' lifestyle, how they experience their home and what they hope to change. The aim is to determine the scope of work required and possible interventions. All of this information is vital to calculating a budget and assessing it against the financial capacity of the household and/or access to financial support. It also helps determine what works might be carried out by trained volunteers.

This phase of a 3SR project reflects that the concept of well-being and a positive home-life experience can vary widely among residents and is specific to their dwelling.

Following this home visit, the Practitioner will advise on whether a 3SR approach is feasible. The level of help required usually depends on two main factors:

- **Situation of the inhabitant(s)**, including income level, degree of social isolation, employment insecurity, family difficulties, etc.
- **Situation of the dwelling**, including damage to walls, cracks, feeling too cold or overheating, humidity, etc.

Discussing this full range of considerations helps both parties define the scope of work needed in the short, medium and long term, and establish how to proceed within the available budget and in line with any other constraints. This upfront interaction is important to informing the householder that it may not be possible to carry out all aspects of desired works under the 3SR approach. Once the decision is taken to proceed with a 3SR project, many other elements need to be put in place.

Phase 2: Implementing a 3SR worksite

Day 1 at a 3SR worksite may be the first time several actors actually meet. While the Facilitator has been the 'point person' who lines up others, volunteers are likely to be meeting each other, as well as the Project Owner and the Worksite Team Leader, for the first time.

Meet, greet and get warmed up

For this reason, 3SR practitioners recommend making time for a 'warm-up'. This often has the two-fold goal of 'breaking the ice' with fun activities that help people get to know each other and gathering information about what existing skills the volunteers bring to the project. The Worksite Team Leader should facilitate this and be first to share information to set a tone of openness. Ideally, this person will also have some distinct item of clothing (a colourful hat, a neon work vest, etc.) that makes them easy to identify, even from a distance.

Team-building activities help enhance communications, in turn improving the security of the worksite and efficiency of the works. Tapping into existing skills while also offering training to build new ones can make each person feel both valued and stimulated. As the work may be labour-intensive, physical warm-up exercises can help avoid muscular pain later.

Establishing rules and administrative reminders

The Worksite Team Leader should then explain to volunteers the code of conduct, particularly as the worksite is the home of the Project Owner. The host may, for example, ask volunteers not to enter particular rooms and make them aware of how to engage (or not) with children and/or any pets.

On the administrative side, the Worksite Team Leader should remind volunteers of the importance of showing up for all shifts they have committed to and of signing the attendance sheet. For the Project Operator, this is vital to knowing the exact number of volunteers on the worksite and being able to appropriately account for the value of their time. It is also critical to tracking the time of Beneficiaries (other than the current hosts) who are 'banking' or 'repaying' hours within the mutual help system. Finally, time sheets are a mechanism to legally protect the volunteers.

Safety rules, task distribution and worksite etiquette

Together with the Practitioner (as well as any other experts or artisans on site), the Worksite Team Leader then shifts the focus to safety and security recommendations, covering topics such as healthy work postures, hazardous elements, personal protective equipment (PPE), co-worker awareness, etc. While this is typically covered at the start of the work, it may be necessary to provide additional information as the work progresses and different tasks are undertaken. The Worksite Team Leader should also inform volunteers about procedures to



follow in case of an accident and is responsible for ensuring a well-equipped first-aid kit is on site.

The Practitioner and Worksite Team Leader will have mapped out a schedule for the entire works, including the objectives to be reached daily. Tasks the volunteers will undertake are charted to align with the bigger picture. The Worksite Team Leader and Practitioner will explain anything about tools and demonstrate techniques, including proper physical movements to boost efficiency and avoid injury.

An important consideration for 3SR worksites is that, as they are not workers, volunteers are not bound by an employment contract and no hierarchical relationship should be enforced. This means volunteers will have opportunity to choose and approve of all tasks they want to undertake (ECs considering a 3SR approach should be fully aware of such legal frameworks).

The Worksite Team Leader fulfils the role of teacher on the site and should be sure to precisely explain every step. They will also observe and monitor the actions of the volunteers, being mindful of the daily objectives. Information and recommendations about objectives, tasks, techniques and materials, and safety should be displayed on the site such that volunteers can easily refer to them often.

3SR projects are meant to be both productive and fun. The Worksite Team Leader should organise breaks (for coffee and lunch) and plan additional fun moments throughout the day to strengthen connections among volunteers and facilitate efficient work.

Throughout all stages of the work, the Worksite Team Leader and the Facilitator should remain available by phone to answer any technical or administrative questions that arise or support the Practitioner and the Project Owner in managing unexpected challenges (absent volunteers, insufficient protective gear, etc.).



Phase 3: Wrapping up a 3SR project

Three activities mark the 'wrap-up' of a 3SR project, each involving different actors. Some happen several times over the course of the project; others only at the very end.

- Worksite clean-up:** A clean-up is carried out by all 'hands' who participated at a worksite on any given day. Typically, it involves cleaning tools and equipment and making sure the worksite is tidy and prepped for the next step. On the last day, it's time for the BIG clean-up – a key aspect of a successful project so the the Project Owners can immediately begin to enjoy their improved home. The time required at the end of each day and on the final day is often underestimated. The Worksite Team Leader needs to properly anticipate for it to be sure volunteers do not have to stay longer than expected on a given day.
- Shared evaluation of the day:** The Worksite Team Leader usually invites all participants to join a 'debriefing session' to recap activities done and objectives reached. This is important to planning the next steps and assessing

Benefits of the 3SR Approach		
Technical	Financial	Social
<ul style="list-style-type: none"> Expert diagnosis and renovation plan Advice on sustainable materials that can be locally sourced Appropriate training of volunteers Oversight of works carried out 	<ul style="list-style-type: none"> Access to wholesale prices for materials (through expert) Generate work for local artisans and support local suppliers Substantially reduced labour costs Low-cost renovation Reduced energy bills 	<ul style="list-style-type: none"> Greater thermal comfort for the householder New sense of pride in the home New skills and knowledge boost self-esteem of householders and volunteers Stronger social cohesion in the community

whether the project is progressing as planned. Beneficiaries and volunteers can also give feedback on anything the Work Team Leader (or anyone else) might do to improve efficiency, further enhance the skills of volunteers or build team spirit.

- **Closing the project, including the paperwork:** The first element of this step typically involves only the Project Operator, the Project Owner

and (possibly) the Work Team Leader. It involves the exchange of two critical documents. The Project Operator presents the final invoice (including fees from the Practitioner or other experts) to the Project Owner (indicating the expected payment schedule). The second document officially indicates completion of the project – i.e. all works contracted have been delivered – and may mark the beginning of a guarantee period.

Proposed evaluation framework

Evaluating ACT mechanisms		
<p>Possible evaluation objectives</p>	<ul style="list-style-type: none"> • To understand the processes, how well they went and their impacts. • To improve the mechanism(s). 	
<p>Possible evaluation questions</p>	<p style="writing-mode: vertical-rl; transform: rotate(180deg);">PROCESS</p> <ul style="list-style-type: none"> • Were the various elements of the plan (e.g.) put in place? What form(s) of interactions or 'events' were implemented (e.g. workshops, home visits, telephone calls)? What content was delivered through these events? What training was carried out? • What successes and/or challenges were experienced in implementing these plans? • What measures were taken to respond to challenges? Did they then lead to successes? • How did householders' experience the 'events' (e.g. did they feel respected)? • How did trainees and energy advisors experience the mechanism (including the 'events' and training, etc. where relevant)? • How can these processes be developed further? 	<p style="writing-mode: vertical-rl; transform: rotate(180deg);">IMPACT</p> <ul style="list-style-type: none"> • What impacts did the mechanisms have on households? For example, was the level of energy poverty reduced? Did they demonstrate increased energy knowledge and energy know-how? • What impacts did the mechanism have on trainees (e.g. learning, confidence, capability)? • Where relevant, what impacts did local partners experience in relation to energy poverty (e.g. in terms of attitudes, learning, confidence, capability)? • What impacts were experienced in terms of developing organisational learning and sustainable relationships for the future?
<p>Possible data sources and methods</p>	<ul style="list-style-type: none"> • Households: Surveys or discussions regarding energy poverty (preferably before and after participation, or only after). Surveys following 'events' (e.g. workshops, home visits or telephone consultations). • Trainees: Surveys or discussions following training sessions. • Energy advisors: Survey or discussions during and after the project. • Management team: Ongoing discussions throughout the project. • If appropriate, local partners: Survey or discussions during and after the project. 	

6/ Financing

Finding the means to support energy solidarity actions

Across Europe and around the world, the EC movement is increasingly committed to delivering social justice through access to clean, affordable energy. An overarching challenge, as confirmed by CEES Partners, is that energy solidarity measures rarely represent a revenue stream. Rather, they are resource-intensive and likely to remain on the 'cost' side of EC balance sheets. In worst cases, they risk rendering standard EC business models unviable.

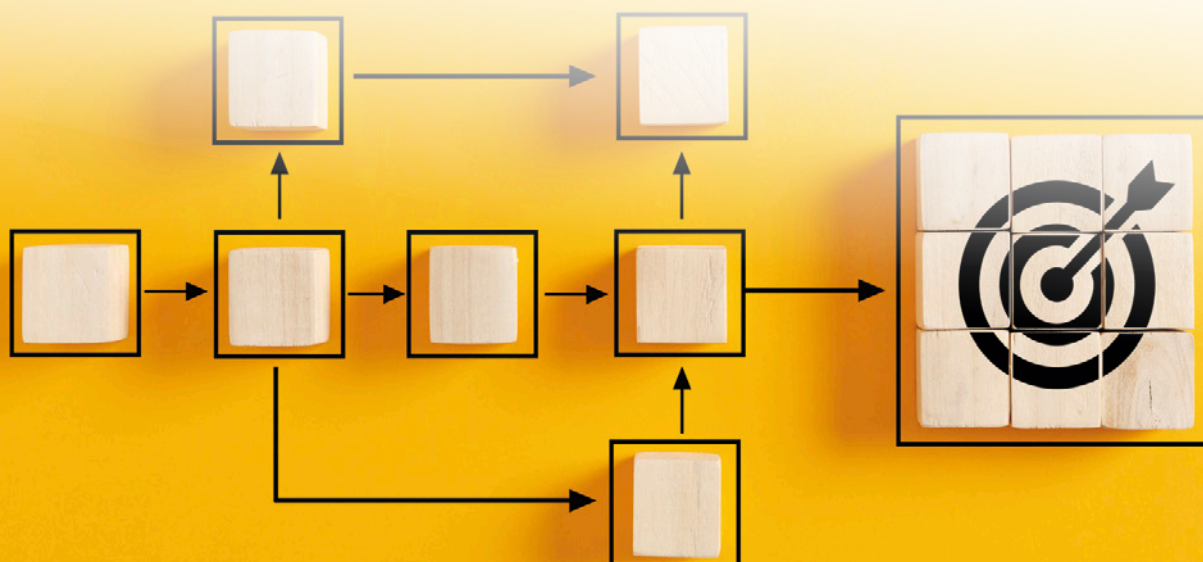
Because energy market structures do not yet reflect the 'added value' of social benefits that accrue, ECs keen to practise energy solidarity must seek other financing mechanisms. As explored in this chapter, developing business models in which 'doing good' and 'doing well financially' are mutually reinforcing (rather than mutually exclusive) requires a blend of strategic thinking, creative community engagement and innovative financial solutions.

Doing good while doing well: can ECs pull it off?

ECs are, in many ways, unique actors in energy markets that are, for the most part, structured to ensure delivery of energy supply under conditions that attract the engagement of large players motivated by profits. A commitment to keeping energy prices low through local, community-owned generation, re-investing profits to support community needs – and increasingly practising energy solidarity to tackle energy poverty – means that ECs bring a fundamentally different business model into the mix.

The EU rightfully recognises that ECs are well placed to play a key role in delivering on the Clean Energy for All Europeans Package. To date, however, policy frameworks (see Chapter 7) do not properly account for challenges that being socially engaged introduces to financial viability.

Evidence is emerging that the long-term benefits of energy solidarity deliver substantial social and economic value that can significantly exceed short-term costs. Under present market structures, however, there is a very real risk that being socially engaged will make ECs fail. And the opportunity to have them deliver for EU citizens will be lost.



As CEES Partners found, being socially engaged often carries high costs, particularly in terms of human resources. While more ECs are showing interest in practising energy solidarity, making it integral to their value proposition often creates compromises on the side of financial health.

The scope of this challenge is reflected in the fact that almost all CEES Partners included testing new financing models within their pilots. The following pages offer insights to help other ECs select funding mechanisms that best fit their own needs and contexts in the quest to implement and scale energy solidarity initiatives.

Donations

Collecting donations is a first option to finance energy solidarity activities. Donors (regardless of their scale) typically seek to support causes they believe will deliver real, meaningful change – and do not expect to acquire anything in return. A key advantage for ECs is that donations are a type of free, unrestricted funding.



This is particularly interesting for financing solidarity activities which do not typically generate an immediate return on investments in the classic, monetary sense but rather aim to generate social impact in the long term.²⁶

Different types of donations, from individual micro-donations of few pennies each to corporate donations worth thousands of euros, can be vital to financing energy solidarity mechanisms. EC members can also take the decision to direct

26. https://www.sccale203050.eu/wp-content/uploads/2023/02/SCCALE203050_financingguide_energycommunities.pdf



TIP FROM CEES PARTNERS COMMUNICATION IS KEY TO DONATION CAMPAIGNS – BEFORE, DURING AND AFTER

A compelling story about how energy solidarity will make tangible differences in the local community is crucial to donation campaigns. Some important factors to consider include:

- **Create a clear message:** Being clear, concise and creative is key. It may help to think of questions such as: **What** problem are some community members (**who**) experiencing and **how** can the EC solve it? **What** will the positive impacts be? **Why** is the donor's participation vital and **how** can they engage? Potential donors should know, at a glance, how their support will make a difference.
- **Identify potential donors:** While donation campaigns often aim to attract the general public, having some target groups with a vested interest can quickly build momentum.
- **Develop a dissemination strategy:** Getting the word out widely is critical. Depending on budget and capacity, ECs should leverage diverse tools such as radio, newspapers, TV, and video; the internet and social media; mobile phones apps; and newsletters, leaflets and posters. Hosting or being present at public events can also be key.
- **Engage other stakeholders:** Identify other groups, networks, organisations or individuals that will benefit indirectly from a successful campaign and ask for their help in promoting it. A 'collective effort' can attract more people, particularly if the EC is a new actor in the local community.
- **Stay engaged with donors:** Acknowledge every donation, as quickly as possible. Then keep updating donors on how the campaign is going. Once the action is underway, let them know how funds are being used and what impacts are being achieved. Keeping donors engaged in the story can secure long-term commitments and future donations. Also, be responsive to donors who request specific information.

Typically, reporting requirements for donations are much less rigorous than for grants and other financing schemes covered in this chapter. But the 'good news' story of what one campaign achieved can trigger engagement in future efforts.

any profit on revenues to such measures. Having a diverse funding portfolio is vital and can help leverage contributions.

To execute a successful donations campaign, it is essential to strike a balance between the desired impacts, the actual costs to achieve them and the funding needed. ECs should not forget to include costs associated with creating a compelling communications campaign to attract potential donors.

Donation-based crowdfunding

Donation-based crowdfunding can be appealing for small entities such as ECs for several reasons: it can help raise your profile, engage a large number of citizens in a worthy cause and doesn't require a lot of work. CEES Partners found the first two to be true but ultimately had to admit that staff time – and therefore costs – can be quite heavy. While many different forms exist, a fundamental principle of donation-based crowdfunding is the expectation that “individuals [will] donate small amounts to meet the larger funding aim of a specific charitable project while receiving no financial or material return.”²⁷

Most donors, however, do like to feel that their contribution will support tangible actions and are particularly drawn to actions that improve something within their own community. They may also appreciate being made aware of a problem they didn't know existed, in which case fundraising can subtly shift public perception and knowledge.

While energy poverty might previously have been 'hidden', the current energy crisis has affected the vast majority of households in Europe. As such, engaging people in efforts to show energy solidarity are particularly relevant.

27. https://single-market-economy.ec.europa.eu/access-finance/guide-crowdfunding/what-crowdfunding/crowdfunding-explained_en#

Still, ECs need to consider multiple factors when determining whether donation-based crowdfunding is a viable option for a given energy solidarity project. Three of the most critical include:

- Legal aspects of donation-based crowdfunding
- Leveraging diverse donation options, and
- Choosing the best tools to execute a campaign.

Legal aspects of donation-based crowdfunding

Legal frameworks for collecting donations are often very strict and may vary widely among Member States. To promote social engagement, many countries offer substantial tax benefits on donations. In France, for example, citizens receive a 66% credit on tax returns, meaning that each donation of €100 actually costs only €44. Often, however, such benefits apply only when the donation is made to certain types of legal entities, such as charitable organisations, non-profit associations, foundations or endowment funds.

Almost all CEES partners encountered barriers in this regard. As they are registered as businesses, cooperatives or social enterprises, the incentive of a tax benefit to donors often does not apply. ECs keen to attract donors using the tax credit incentive typically have two options to consider.

- **Partner with an existing entity with the eligible legal status:** This might be a foundation, charity or non-profit association.
- **Establish a second, separate entity with the right legal status:** ECs might find it worthwhile to set up a separate non-profit association or registered charitable organisation that can take donations. Depending on national legislation and other factors, it can be a heavy burden to set up and maintain, particularly as it is likely

ASSESSING YOUR CAPACITY – at a glance

Material costs	Human resources	Ease of replicability
\$		
Main costs are associated with subscribing to a crowd-funding platform and developing marketing materials.	The perception that crowd-funding is simple and easy is misguided; substantial human resources are required for drawing attention to the campaign, keeping supporters up to date, and (when possible) providing tax receipts.	Diverse approaches to crowd-funding are well established and can be adopted or modified to suit the particular campaign. Once one campaign is completed, executing others will be less time-intensive.

to require separate administrative systems and reporting. It is thus critical to weigh the advantages and disadvantages in relation to broader objectives.



TIP FROM ZEZ PARTNERING CAN BE A GREAT EXPERIENCE!

ZEZ exists in Croatia as a 'energy cooperative' that generates energy; however, it does not have a licence to supply. As such, it does not have a 'customer base' of its own. In turn, being neither a foundation nor a charitable organization, it lacks a legal mechanism by which it can accept donations and offer tax benefits.

When seeking to launch a highly public crowdfunding campaign, ZEZ approached a well-known and trusted national foundation – [Solidarna Foundation](#) – to explore the prospect of partnering. The Foundation also had the benefit of recent high visibility, as it organised a massive campaign following the Petrinja earthquake on 29 December 2020, which led to several deaths and destroyed half of the buildings in the city.

Solidarna Foundation quickly agreed to join forces, thereby making it possible for donors to access the tax benefits. For ZEZ, the partnership brought tremendous value in terms of raising visibility and lending credibility, which built public trust.

ZEZ took the advice of Enercoop and made it possible for people to donate through various mechanisms. In addition to putting content about the campaign and a 'donate' button on its website (as well as a QR code), ZEZ developed a mobile application called Sunči (Sunny). The app had a dual mission. First, using push notifications, it 'nudged' users of solar PV systems to be more energy efficient and optimise their self-consumption. In turn, it prompted them to help households in energy vulnerability by clicking on the micro-donation button to contribute the amount they saved on energy bills by responding to the nudges.

Leverage diverse donation options

Placing a 'Donate' button and/or a QR code prominently on your website is a straightforward way to make it easy for people to contribute through an online form or using their smartphones. Typically, a variety of payment mechanisms exist 'behind' the button. ECs need to ensure that what they choose supports a secure transfer of funds for both the donor and the recipient. As most have fees, it is important to compare the costs and levels of services provided.

ECs should give donors the choice to have their names shown or remain anonymous. To recognise large contributions, ECs may want to consider having a recognition (or 'Thank you for the support') page and attaching a status to different levels. Also, while raising donations, it can be motivating to have a 'tracker' or to periodically report on the amount raised. This can build on momentum and encourage those who have not yet participated become part of the solidarity community by doing so.

Over the longer term, a donate button can facilitate a steady flow of contributions that are not tied to a specific campaign. Critically, as mentioned above, ECs need to clearly state whether their legal status supports tax benefits.

Choosing the best tools to execute a campaign

Opting to launch a campaign through an external crowdfunding platform can offer multiple benefits. For new ECs or those launching their first crowdfunding campaign, the opportunity to reach the platform's existing supporters can be a huge drawing card. Most platforms make it very easy to launch a campaign and offer tips for success. When selecting a platform, ECs should consider the following:

- **Platform specificities:** Some platforms specialise in particular types of projects (e.g. technical innovation, start-ups or helping people in need) or serve only certain geographical regions.
- **Popularity at the scale needed:** Depending on the geographical scope (local, regional, national or European) of the project and the fundraising goal, ECs may want to select a platform that targets a narrow group or is extremely wide.
- **Easy payment system for donors:** Payments and/or donations can be made through a donation button set up on the EC website, specific campaign pages, with a QR code or using EC social media channels. As they are

linked to digital collection of money (via Open Banking financial technology and through use of application programming interfaces (APIs)), such systems allow anonymous (if preferred), secure and easy-to-use digital ways to donate from a bank account or a debit card.

- **Payout schemes and related fees:** Most crowdfunding platforms charge a fee to campaign organisers, which should be considered as a 'cost line' in setting the fundraising goal. Typically, the fee is a small percentage (2-5%) of each donation and many platforms ask donors to consider covering it, so their full donation goes to the campaign. Relative to the time and cost of developing a platform from scratch, the fee is usually quite low. Reading 'the fine print' about when funds raised will be transferred to the EC is also critical. A long payout period could create cash flow problems if the campaign has early expenses.
- **Country in which the platform is legally registered:** The precise pathways through which money flows, including its origin and destination, as well as temporary storage locations within the platform, carry significant implications for both safety and cost. Ensuring the platform is headquartered in a country with a reputable banking system is critical to avoid potential problems. Selecting a platform in a country other than where the EC and the target donors are located can lead to excessive currency exchange and transfer fees.
- **Features:** Consider the various features needed to run a successful fundraising campaign. This might include things like whether it is possible to upload EC branding, photos and videos and how easy it is to link the platform to EC social media channels. Also, look for a platform that automates key functions such as preparing tax receipts (where applicable) and sending

notes of thanks and updates to supporters. Such platforms can substantially reduce administrative burdens and related expenses.

Micro-donations

Micro-donation is a specific type of crowdfunding scheme that warrants a separate explanation. As some CEES Partners learned, it can be more difficult to implement than expected. The primary difference (as compared to more standard crowdfunding described above) is that it seeks to capture small donations from very many people (e.g. the general public), usually by giving them the option to 'round up the bill' when making purchases.

Under the right circumstances, micro-donations can be extremely effective. The simple act of clicking 'yes' while already making a payment and the small sums (between €0.01 and €0.99) make it an easy decision for many people who might not otherwise go to the trouble of looking up how to donate to a specific organisation or EC.

Generally, organisations use one of two approaches for micro-donations. Entities with a large client base that regularly purchases goods or services can easily integrate the micro-donation option into bills (see Case Study: Énergie Solidaire) or to cash registers or card payment devices. Smaller entities with fewer customers and more sporadic purchases may try to partner with large organisations or businesses (e.g. a supermarket, hardware store or even an energy supplier) that may be looking for ways to help their clients support local social causes. In some cases, very local shops or small businesses may be open to collaboration.

CEES pilots revealed three substantial barriers to efforts to establish either approach. First, most ECs do not have a particularly large client base and sell only one product, on a monthly billing schedule.

ASSESSING YOUR CAPACITY – at a glance

Material costs	Human resources	Ease of replicability
\$\$\$		
Substantial costs may be incurred to develop applications or platforms for collecting micro-donations and for marketing materials to draw attention to the campaigns.	Finding partners willing to participate in micro-donations may require a great deal of time. In turn, setting up the technical mechanisms for collecting and transferring funds may be difficult.	Logistics, legal aspects and the heavy work involved in setting up micro-donation schemes makes them difficult to replicate.



Case study. Making micro-donations work through Énergie Solidaire and Enercoop

Enercoop is a classic example of an EC with a legal/fiscal dilemma when it comes to donations. Since it was launched in 2005, Enercoop has had the vision to practice energy solidarity – and to engage its customers in such actions. As a cooperative energy supplier, it aims to keep low prices for customers, which means it has much lower profit margins than many large electricity suppliers. As such, Enercoop has relatively little ‘extra’ money to direct to solidarity initiatives. More to the point for micro-donations, while it believed many people in its customer base (now ~80 000 households) would support helping members in need, it cannot offer any tax benefits to individual donors.

In 2017, this gap was bridged through the establishment of [Énergie Solidaire](#) an endowment fund with non-profit status in France. Énergie Solidaire uses innovative methods

to collect donations (such as giving customers the option to make micro-donations linked to their energy bills) and subsequently allocates funds collected to local non-profit organisations through open calls for project financing. In turn, the associations help vulnerable households escape the grip of energy poverty.

The close yet distinct relationship between Enercoop and Énergie Solidaire facilitates micro-donations and tax benefits. Whether they participate by rounding up their monthly Enercoop bill (reflecting an amount based on the kilowatt hours they consume) or by linking to Énergie Solidaire through a donate button on the Enercoop website, the financial transaction is between the client and the charitable organisation. As such, clients are eligible for a tax benefit equivalent to 66% the micro-donation.

This makes it difficult to get a large volume of small donations. Second, small and local businesses may be keen to support local social causes but unable to absorb the costs and efforts linked to taking and transferring the donations. Finally, for large entities with many customers and transactions, decisions about what organisations to support are typically made at company headquarters. While the local branch of a hardware store, for example, may like the idea of supporting local energy solidarity measures, they may not have authority to do so. While CEES anticipates micro-donations will not be feasible for most ECs, the case study of Énergie Solidaire offers insights into a successful scheme.

Simplicity is key to micro-donation schemes: people do not want it to take a lot of time and effort to give a few pennies. How ECs might go about implementing such schemes depends heavily on whether or not they have an existing customer base.

Under the right circumstances, a micro-donation scheme can provide a relatively stable funding stream. ECs that need to partner with other retailers or organisations should keep in mind that micro-donations are usually very small amounts, often made on impulse. It would likely be unwise to consider this approach as part of long-term base funding.

Considerations when planning a micro-donations campaign	
EC with a customer base	EC with no customer base
<p>ECs that are also suppliers have a distinct advantage when looking to integrate micro-donations into their own billing schemes: a target audience that already knows and trusts them.</p> <p>Maintaining that trust is paramount and must underpin a key aspect that also has legal implications: whatever format they take, micro-donation schemes must be structured to be ‘opt-in’ on the customer side (i.e. participating cannot be the ‘default’).</p> <p>While providing various ways to participate can be helpful, ECs should avoid having so many interfaces, apps and websites that customers become confused about who is doing what – and what they are being asked to do, why and for whom.</p> <p>Also, while it is critical to draw customer attention to the option to participate, it is also important to not bombard them with so many requests that they might become annoyed and switch suppliers.</p> <p>If an EC is registered as a company or cooperative that cannot provide tax receipts for such donations, this must also be explicitly stated. Similarly, if they are partnering with a charitable organisation that can offer tax benefits, this must be transparent, including any financial implications.</p>	<p>ECs that do not have a client base and billing system will likely find it much more difficult to implement a micro-donations scheme. They also need to consider carefully whether the potential revenues warrant the time and effort involved.</p> <p>To start, they have to consider what target groups are likely to support their cause and research partners and sale points that will resonate with that target group.</p> <p>While many large organisations and retailers (both high street and online) participate in micro-donation schemes, establishing a partnership with them may be more complicated than anticipated, as they likely have policies about what causes they will support and rigorous processes when considering new partners. They may also be obliged to transfer funds only to non-profit organisations, which could make ECs that are companies or cooperatives ineligible.</p> <p>If a potential partner is identified, ECs need to verify that they comply with relevant financial regulations and have reliable payment services or platforms.</p> <p>Finally, it is critical to establish clear agreements among all partners involved, including GDPR, rounding up options, how the funds will be used by the EC, etc.</p>

Corporate donations

Increasingly, whether through internal policy or national legislation, large companies are expected to participate in corporate social responsibility (CSR), responsible business conduct (RBC) or environmental, social and governance (ESG) schemes.

In the European Union, these refer to voluntary actions that companies undertake to integrate social, environmental or ethical issues into their own business operations or to participate in programmes set up by others. Collectively, these efforts are designed to support the larger, collective goal of sustainable development. The European Commission has established a mix of voluntary

and mandatory frameworks and initiatives that provide guidance to Member States on what issues to prioritise and what actions to take. Critically, these frameworks also establish mechanisms for measuring impacts and ensuring transparency.^{28 29}

With the current energy crisis having brought the just, clean energy transition to the fore – both on political agendas and in people's personal lives – proposing energy solidarity measures as ways to practice both energy and climate justice can be appealing for companies.

28. <https://ec.europa.eu/docsroom/documents/34482>

29. <https://www.europarl.europa.eu/news/en/press-room/20220620IPR33413/new-social-and-environmental-reporting-rules-for-large-companies>

ASSESSING YOUR CAPACITY – at a glance

Material costs	Human resources	Ease of replicability
\$		
ECs will need to develop an appropriate 'pitch deck' and may incur some costs for visiting various potential sponsors.	Researching potential donors requires substantial time to find those with objectives that align with ECs. The 'pitch deck' and other materials may need to be modified for each potential sponsor.	Once research is done and materials prepared, substantially less effort is required to adapt pitches to diverse potential funders.



INSPIRING PRACTICE

ENERGY GARDEN AND PATAGONIA, UK

Energy Garden is a British community initiative that, since 2012, has been busy transforming railway stations in London into thriving food and energy hubs. Across almost 30 projects, Energy Garden combines solar installations with vegetable gardens run by locals. Impact assessments show that engaging people in climate solutions has increased cohesion and inclusiveness in some of the capital's most deprived neighbourhoods.

Inspired by the project, in 2021 the multinational outerwear company Patagonia partnered with Energy Garden to expand operations.

Calculating energy demand for its two UK stores (in Manchester and Bristol) and its Manchester showroom to be around 80 MW per year, Patagonia entered into a power purchase agreement (PPA) to source this power from Energy Garden's array of 500-plus panels in Streatham, London. The agreement, the first of

its kind in the UK, was facilitated by [Younity](#), an organisation dedicated to supporting the growth of community energy.

But there is more! For every kilowatt of electricity it buys from Energy Garden, Patagonia pays an additional 'social premium' to support Energy Garden's work with local communities. Through this premium, which Energy Garden considers as a major breakthrough, Patagonia provides crucial financial support beyond its purchase of renewable energy. Energy Garden uses these funds for activities that deliver social and environmental benefits, including community engagement, schools-based education, and youth training.

This collaboration between Patagonia and Energy Garden is now a model for corporations to meet their own CSR aims while supporting wider deployment of ECs.³⁰

30. [Patagonia, How Business can scale up community energy for a cleaner and more secure energy future.](#)

Community energy revenues

ASSESSING YOUR CAPACITY – at a glance		
Material costs	Human resources	Ease of replicability
\$\$\$		
ECs will need to develop clear communications materials that explain how revenues will be collected and decision-making processes to determine how any excess will be used.	Substantial effort is required by EC administrators to collect revenues. In turn, implementing a democratic process to make decisions regarding the use of funds can be time-intensive.	As each EC is unique and serves the needs of a unique community, the collection and use of community energy revenues must be highly customised.

ECs are engaged in delivering an increasingly wide array of products and services, ranging from generating electricity, operating local distribution grids and supplying electricity to end-users to energy efficiency renovations, energy storage, electro-mobility and other emerging options.³¹ Such activities are not profit-driven, but rather have the purpose to enhance social justice, boost the local economy and strengthen ecological resilience. Any revenue resulting from delivering such energy services is therefore structured to cover operations and maintenance of technical assets, pay staff costs, and to disburse interest to investors and ultimately repay their capital, with low overall profits.

In turn, most have an upfront agreement to reinvest any excess revenues in developing new projects. This creates the opportunity to self-finance energy solidarity measures to boost social impacts in the EC's local area, which can enhance its credibility among citizens and other actors. Eventually, being able to demonstrate the value of such social impacts can trigger greater involvement and collaboration – and attract investors.

Building energy solidarity into EC business models

The CEES pilots demonstrate that while some energy solidarity measures have low material costs, almost all require substantial effort by staff and/or volunteers (who need direction and support from staff).

As such, a decision to implement energy solidarity measures is likely to mean that ECs need to revisit their business models to consider how to generate additional revenues from different products or services. In line with democratic principles of ECs, any proposal to change the business model must be approved by a majority of voices.

Could, for example, electricity tariffs be somewhat higher for businesses and some residential customers, ensuring transparency about the differences in rates and explaining how the higher rates enable solidarity. For ECs that provide consulting services, another option could be to incorporate an 'energy solidarity surcharge' in fees (again, in a transparent way).

CEES highly recommends, as some ECs already do, building a 'community fund for energy solidarity' into the lifetime costs for given projects.

Proposal and budgeting considerations

Ultimately, ECs need to balance income and expenses to continue providing their primary products and services to their client base and to satisfy investors. When considering integrating energy solidarity measures, it is critical to factor in a third element: what need(s) of vulnerable households can the EC meet with the resources available. To build trust, ECs must avoid putting money and effort into projects that target groups find to be of little value or, indeed, wasteful.

Either way, ECs must be prepared with a proper proposal and detailed budget to ensure voting members and investors can make informed decisions. The budget will determine whether the EC can launch some type of measure on its own or if it will need to seek additional funding from outside sources.

Market research and life-cycle budgeting are critical in the case that an EC wants to consider a new project – e.g. a new PV installation – that involves capital costs. The proposal should also include details on how potential investors can be involved in the project in the short term and over the long term. In the case of considering

31. <https://www.rescoop.eu/toolbox/community-energy-a-practical-guide-to-reclaiming-power>

a surcharge for businesses or a sub-segment of consumers, ECs should test the idea with

representatives of groups that would be affected as part of market research.



INSPIRING PRACTICE

ECS AND MUNICIPALITIES: THE PERFECT MATCH?

In the context of the Horizon 2020 PowerUP project, the Belgian city of Eeklo partnered with Ecopower (an energy cooperative) to tackle energy poverty among low-income and vulnerable households in a holistic way. In addition to supplying local, clean energy at a fair price, the project sought to improve access to energy efficiency services.

Central to the scheme is a wind turbine, co-owned by the city and the cooperative, which had a strong membership base who were already enjoying low-cost electricity while revenues generated were satisfying the business model and investors.

The membership fee, however, was prohibitive to households who are most burdened by market energy prices (particularly in relation to household budgets).

To get over this obstacle, the municipality agreed to pre-finance the shares for households experiencing energy poverty, with a very low repayment plan added to energy bills over a period of five years. In addition to benefiting from the low-cost energy, these households became voting members of the cooperative and are now decision makers in the clean energy transition. The city has allocated a rolling fund to this initiative, meaning that as some memberships are paid off, they will be able to offer the same scheme to other households – always targeting those in greatest need.



INSPIRING PRACTICE

ENERGY AGENCY (SCOTLAND, UK): SUSTAINABLE FINANCE MODEL

The Energy Agency is a charitable organisation in southwest Scotland that offers a range of services to homes, businesses and communities. In addition to delivering advice and energy efficiency measures, it raises awareness about renewable energy, sustainable transport and reducing carbon emissions.

Much of the Agency's focus is on providing free advice directly to clients, including by distributing materials in diverse formats and at events. They also work closely with health and social care professionals who provide diverse services to vulnerable households.

Most funding for the Energy Agency comes from the Scottish Government, either directly or indirectly through area-based schemes for energy efficiency measures, financial inclusion budgets from local councils, and from energy company obligation resources. While the funds may be substantial, most are short term, which makes it difficult for the Agency to develop and execute any long-term strategies.

To create its own sustainable funding stream, the Energy Agency developed and installed a hydroelectric plant. Situated in the River Ayr, the Nethermills Hydro Scheme is a 90 kW Archimedean single screw turbine, installed on an existing weir that historically housed a corn mill. The clean energy generated is used locally by Ayrshire College, with excess power distributed through the grid, providing income for the Energy Agency.

To finance the £1-million project, the Energy Agency set up a subsidiary company – Energy Agency Renewables Ltd – which installed, owns and operates the plant. Community engagement was central from the start. In addition to using regional contractors, the company collaborated with the local community and the College. Local environment agencies, archaeologists and biologists were brought on board to monitor environmental impacts and minimise disruption.

With an expected lifespan of 50-60 years – and supporting the non-profit's efforts to tackle energy poverty built into its business model – the new company ensures sustainable, long-term funding for an already trusted non-profit organisation.

To the whole community, it delivers added value in multiple ways:

- Local sustainability with generated electricity used at source, contributing to the net-zero transition.
- CO₂ emissions reduction.
- Demonstrator project for renewables and green technology courses delivered by Ayrshire College.
- Ecological benefits of improved access for fish and eel migration, as well as enhanced environmental monitoring through the installation of a fish counter that assesses the health of the river in real time.

Grants

ASSESSING YOUR CAPACITY – at a glance

Material costs	Human resources	Ease of replicability
\$		
Grant applications typically have very low material costs, particularly as most are done electronically.	Grant applications can take substantial time, particularly those that require engagement of multiple partners from different countries.	Once the information for a grant application is collated, it may be applicable to other applications. Also, an innovative project idea may be attractive to multiple granting agencies, as long as no restrictions or conflict of interest arise.

Similar to the donation mechanisms described above, grants do not require financial repayment. They are a type of 'investment' that is repaid through the generation of impactful outcomes that align with specific objectives of the public authority, foundation, corporation or organisation offering the grant. In contrast to donations, which are often unrestricted and collected in flexible ways, grants are generally purpose-specific and competitive, with strict conditions and reporting requirements. To secure grant funding, ECs need to demonstrate their capacity to create impactful and cost-effective projects.

Grant financing can be especially vital for small ECs when aiming to launch a project with a high social impact – such as energy solidarity measures – that could negatively influence their bottom line. As noted elsewhere, as ECs typically aim to have relatively low profit margins, it can be difficult to cover the costs and staff time needed for activities that serve the community.

Successfully securing grants hinges on finding a balance across three critical elements: application and reporting requirements/efforts of the grant; the impacts that the EC will be able to deliver with the support (to what extent does what the EC wants to achieve align with the grants' purpose or specific topic); and the appropriate level of funding available through of the grant.

ECs, especially those with a small staff and limited resources, need to be aware that applying for grants can be time-consuming and onerous. It is not unusual, for example, for a team of 8-10 people to dedicate substantial time over 2-3 months when developing proposals for EU grants. Once an EU grant is awarded, substantial staff time will need to be dedicated to management and reporting procedures.



ECs need to consider several important aspects when preparing for competitive grant funding:

- Investigate available grant funding opportunities, considering both governmental and non-governmental sources, to identify which are appropriate to the aims and goals of a given energy solidarity project. Review carefully all criteria for eligibility.
- When preparing an application, clearly define the goals, objectives and scope of the energy solidarity project. Identify the target beneficiaries and the anticipated social impacts.

It is important to identify grants that offer the best potential return on time invested and do not create risks later. Understanding what is required at each stage – from application through project execution (once a grant is awarded) and in reporting to secure final payments. The following questions can



TIP FROM CEES PARTNERS

QUESTIONS TO ASK WHEN ASSESSING POTENTIAL GRANTS

- Is the level of funding sufficient to carry out an impactful project?
- Is there a co-financing requirement that implies contribution by the EC or seeking additional external funders?
- Does the grant offer any benefits other than a financial contribution (e.g. mentoring, visibility that boosts the EC's credibility)?
- What initial outlay, effort or investment is expected on the part of the EC?
- What are the application and reporting requirements?
- What is the probability of success? How many applicants might be applying for how much funding or number of projects expected to receive funds?
- What can the funding cover and/or how much of it is unreserved? Are expenses such as staff costs, equipment and overhead eligible?
- What timescale does it cover? Is this sufficient for executing the project?
- What is the payment schedule? Caution: Some grant funds can only be claimed retrospectively (i.e. upon providing proof of the expenditures), which can lead to potential cash-flow problems.
- Any particular extra risks or issues identified?
- If the grant is awarded, what are the consequences of not accepting it?



TIP FROM RESCOOP.EU

INVESTIGATE GOVERNMENT SOURCES, ACROSS ALL LEVELS

Most EU Member States have a range of grants dedicated to developing renewable energy projects and/or supporting the just, clean energy transition in other ways. ECs should consult potential sources such as national development agencies, ministries of energy or the environment or, where applicable, the national energy agency.

Often, a large share of national funds are disbursed to more local entities, such as municipalities. These may be even more appropriate as they often have a mandate to support projects that benefit citizens in the local community. Indeed, the local municipality may be the first and best partner for ECs to consider engaging with.

help ECs determine which grants to prioritise – and which may not be worth the trouble.

Typically, grant applications require detailed information on the project plan, anticipated deliverables and outcomes, and cost estimates to justify the requested budget. Many also require supporting documents such as recent tax returns, proof of legal status, and letters of support (among others).

Once a grant is awarded, the REAL work begins. At this point, the EC will need to appropriately staff the various roles and procure other resources to carry out activities and ultimately deliver all aspects of the project. Most grants require some level of monitoring and evaluation along with reports that trigger the release of the final funds.

Useful resources:

- For EU Countries: [Overview of financing opportunities by the Covenant of Mayors](#)
- For the UK: [Overview of funding and grant opportunities by Community Energy England](#)



Cooperative loans and crowdfunding

Beyond the donation-based schemes described earlier in this chapter, other types of crowdfunding have become vital in supporting social impact projects. These include approaches such as equity crowdfunding, rewards-based crowdfunding and peer-to-peer lending (also known as debt crowdfunding).³² All have the underlying aim of creating ways for individual citizens to contribute financially to projects with the expectation of receiving some type of return, which may be financial or non-financial. By involving 'the crowd', such approaches not only raise funds, but also boost community engagement and increase visibility of the project. Over time, they can build a strong base of supporters and advocates for a given cause.



ASSESSING YOUR CAPACITY – at a glance

Material costs	Human resources	Ease of replicability
\$\$		
Cooperative loans and this type of crowdfunding require substantial marketing / communications activity and imply formal agreements.	A range of staff and/or external experts will need to be involved, including marketing experts, legal advisors, and administrators.	Once models appropriate to a particular project are developed, it may be relatively straightforward to apply them to others.

In essence, these mechanisms empower many groups (including ECs) to finance their solidarity activities through small loans, rather than going to banks or turning to large investment firms. They are based on the concept that many citizens will agree to 'invest' whatever sum they choose, knowing up front what they will receive in return. The 'payback' may be that they earn some level of interest over a certain period and the capital they invested will eventually be returned. Alternatively, they may acquire some share of ownership in the project or have some say in how profits will be used.

An EC could, for example, use funds collected from investors to install a solar PV system on a building that houses a local charity, thereby facilitating self-consumption of clean, low-cost electricity. Over time, the charity can direct money saved on energy bills towards paying back the installation costs – and potentially have additional money to put into its community projects. Once the initial loan is paid back, ownership of the asset (the installation) can be

transferred to the charity. In the meantime, investors have earned some interest and eventually had their capital returned (which many chose to re-invest).

ECs need to be aware that such initiatives, while having high potential for positive impacts, require substantial effort (e.g. feasibility studies, operation costs, obtaining necessary permits and licences) that have to be built into project costs. Before approaching investors (or proposing the idea to a charity), the EC would also need to carry out technical and economic pre-analyses to assess potential rewards and associated risks. Seeking bids from PV installers would also be critical to estimating the project budget. All of this 'pre-financing' work is necessary to calculate the scope and funds needed.

Armed with a detailed project proposal, the EC can start building up a network of potential investors, having a good sense of how many they need at what levels of engagement. New ECs may find it challenging to attract investors. To boost credibility, some have found it helpful to secure 'letters of intent' from the charity, the selected installer, other

32. https://single-market-economy.ec.europa.eu/access-finance/guide-crowdfunding/what-crowdfunding/crowdfunding-explained_en



Case study. Coopérnico's model of cooperative loans

Coopérnico's legal status is that of an energy cooperative in Portugal. Under this structure, its members can lend capital to the cooperative to support the installation of rooftop solar PV systems on the property of partner institutions to enable generation for self-consumption. Often, Coopérnico installs such systems on buildings in which non-profit associations operate on the principle that lower energy bills empower them to devote more of their budgets to delivering services.

The institution or charity consumes the electricity produced by the installation, paying a tariff to Coopérnico that typically saves 10% to 20% on electricity bills. With profits realised, Coopérnico is able to pay interest to the investors, and eventually reimburse their capital.

Members who participate in a given loan agree to a yearly return on investment (ROI) that varies by project – usually an attractive 2.5 to 4%. They also agree to leave their investment in place

for the full period of the contract (which also varies by project, usually 10 to 15 years). Coopérnico carries the obligation to monitor and maintain the PV system.

A critical aspect of the cooperative loan approach is that at the end of the contract, both the charity and the lenders realise benefits. Ownership of the PV system is transferred to the participating institution, giving them a valuable asset, their own electricity supply and a potential source of revenue through selling excess generation to the grid. The original capital is returned to investors (who have also accrued the annual return).

To date, Coopérnico has applied this model only to finance solar PV installations (a total of 44 PV systems). Believing it can also be effective for energy efficiency measures, Coopérnico is now investigating how to adapt the model. Coopérnico is also considering the future possibility of sharing surplus electricity production with families in energy vulnerability.



potential stakeholders or early investors. The distinction between such letters and actual contracts is important, as the letters can clearly state that the project will not proceed unless sufficient investment is secured.

Typically, once funding is secured and the project gets the green light, contracts are quickly put in place (based on the letters of intent) and works can proceed. The EC then holds responsibility for monitoring and maintenance for the installation to ensure it is producing at optimal capacity in line with the business model on which all agreements are based.



TIP FROM CEES HANDBOOK ON FINANCING ENERGY POVERTY MITIGATION ACTIONS

From the outset, CEES Partners expressed substantial challenges related to financing the types of actions they implement (or would like to) in order to reduce energy vulnerability in their target communities.

Extensive interaction among Partners, coupled with workshops to engage external organisations and financing bodies, created opportunity to probe existing barriers and enablers in each of the Partner countries. It also brought to light good practices developed by others that ECs could adopt or adapt. The CEES Handbook on Financing Energy Poverty Mitigation Actions concludes with relevant policy recommendations.

A key message to ECs in the Handbook is that, when seeking funds, customising communication and marketing strategies to highlight positive impacts and underscore how donations can transform lives is essential. Demonstrating how targeted action can deliver socio-economic benefits, rather than focusing solely on the negative ramifications of energy poverty, provides a stronger 'call to engage'.

Another possibility is to set up a scheme that offers low-cost loans to energy vulnerable households that, for various reasons, are unable to access sufficient public funding to renovate their homes, replace old, inefficient boilers or install rooftop solar panels.

Some ECs have been able to attract investors who are most interested in the value of social impacts and agree to accept lower financial returns as a means to direct additional funds towards implementing energy solidarity measures.

Whatever the structure of the project and the crowdfunding mechanism, ECs must be clear about the type of investment they are seeking.

- **Equity crowdfunding or cooperative loans** offer to investors ownership shares and associated future profits.
- **Debt crowdfunding** is a simpler financial transaction, offering to investors interest on the amount loaned but no ownership.

They must also be transparent about what a project failure would mean for investors.³³

33. https://www.sccale203050.eu/wp-content/uploads/2023/02/SCCALE203050_financingguide_energycommunities.pdf

Proposed evaluation framework

Evaluating FINANCING mechanisms		
Possible evaluation objectives	<ul style="list-style-type: none"> • To understand the processes, how well they went and their impacts. • To improve the mechanism(s). 	
Possible evaluation questions	PROCESS <ul style="list-style-type: none"> • What plans were put in place for the funding mechanisms? (e.g. public donations, corporate donations, grants, micro-donations, service agreements)? • What successes and challenges were experienced in implementing these plans? What measures were taken to respond to challenges? • How can these processes be developed further? 	IMPACT <ul style="list-style-type: none"> • How much money was raised through each fundraising activity (in absolute terms and over time)? • For each approach, what are the relationships between: the resources and time needed for research and set-up, the amounts raised and the longer-term potential of the approach?
Possible data sources and methods	<ul style="list-style-type: none"> • Monitoring and record-keeping. • Discussions with fund-raising/management teams. 	

7 / Legal and regulatory considerations

For ECs and for energy solidarity

The ambitious aim of achieving a 'just, clean energy transition' in the European Union implies re-thinking how energy systems work, which is closely linked to the policies and regulations that set the 'rules of engagement' for a vast array of actors. Importantly, the role of ECs in upholding energy justice is gaining recognition and traction.

In testing various energy solidarity mechanisms to tackle energy poverty, CEES Partners quickly discovered that local contexts can help or hinder their efforts. This includes the ways in which targets and directives set at the EU level are implemented by Member States – and whether national governments empower local administrations.

This chapter highlights some barriers CEES Partners or other ECs have encountered and offers insights on how to turn them into opportunities.

Fundamentals of an effective energy policy framework

In launching (in 2020), the European Green Deal, the EU set the ambitious goal of making Europe the first carbon-neutral continent by 2050. Recognising the critical role of energy production and consumption – and the fact that current energy systems often create injustices for the most vulnerable citizens – the EU embedded into the deal the concept of a 'just, clean energy transition'.

In fact, this built on the EU [Clean Energy for All Europeans](#) Package, which entered into force in 2019. A key element of this earlier package is that it gives all EU citizens the right to set up an energy community (EC) or to become part of one. It also recognised the important role ECs could play in tackling energy poverty by delivering locally generated clean energy. As with all EU frameworks, Member States have considerable latitude in deciding how they will achieve specific targets and establishing relative policy frameworks at national level. Not surprisingly, changing policy takes time and careful consideration of many factors. Adding the element of 'energy justice' also means thinking





TIP FROM RESCOOP.EU GET INVOLVED – AND BE ASSERTIVE

The Clean Energy for All Europeans Package gives all EU citizens and EC representatives the right to participate in policy dialogues, consultations, workshops or forums, (e.g., under the Multi-level Climate and Energy Dialogues, foreseen under the Governance Regulation).

ECs should not hesitate to leverage such opportunities to:

- a) make the case for enabling EC efforts to tackle energy poverty, reflecting their ability to provide renewable energy services that are collectively and locally owned;
- b) showcase the broader social, ecological and economic impacts ECs can deliver to communities;
- c) explain how current legal and policy frameworks create barriers to achieve EU targets for ECs and for eradicating energy poverty; and
- d) express their ideas for effective legal and policy frameworks, including by presenting good practices already in place in other Member States or jurisdictions.

'across' policy areas to examine, for instance, how energy and social policies interact.

At present, the criteria for establishing ECs vary widely, with some Member States embedding principles of energy solidarity and others still making it difficult for ECs to participate in national energy systems. In many cases, either within jurisdictions or across EU Member States, more effort is needed to achieve a level playing field for ECs in the energy system. Similarly, some Member States are implementing effective policies to ensure the transition is just by prioritising actions that lift vulnerable households out of energy poverty. Others still lack any clear definition of energy poverty and have made little effort to implement relevant strategies.

Six years after the Clean Energy for All Europeans Package came into force, Member States are advancing at different paces in fully recognising ECs as players in energy markets – and in meeting their legal obligation to ensure that ECs and their benefits are accessible to all, including low-income

Recovery and Resilience Fund tracker

This financing tracker assesses whether and how the Recovery and Resilience Funds are being used by Member States to support energy communities. This tracker is subject to change based on new information we receive.

Transposition tracker

Our transposition tracker assesses the progress of the national transposition of the main EU legal provisions on the Renewable Energy Community (REC) and Citizen Energy Community (CEC), namely Definitions of RECs and CECs and enabling frameworks and national support schemes for RECs and CECs.

and vulnerable households. Fortunately, the Package also gave everyone the chance to be part of the change.

To help ECs, policy makers and other stakeholders across Europe accelerate and improve the process of transposing EU provisions into national legislation, REScoop.eu developed the [Transposition Tracker](#). This online tool 'scores' EU countries on different indicators to show where they are making progress or perhaps lagging. Indicators currently being tracked cover diverse areas, including whether policies are in place to promote the participation of low-income and vulnerable households in ECs.

A sub-tool, the [Financing Tracker](#) sheds light on whether and how Member States are using EU public funds – specifically the Recovery & Resilience Fund (RRF), the Cohesion Fund, Modernisation Funds and monies available through REPowerEU – to support ECs. Establishing enabling frameworks to facilitate ECs' access to finance is part of the Member States' obligations. To date, under-absorption and exclusion of smaller actors in the process of implementing these funds remain important issues.

Aside from tapping into vital information, ECs can use such trackers and other related documents to push their national and local governments to 'step up their game'. Also, these tools typically include good practice examples that can be adopted or adapted as needed in other contexts.

Legal and policy frameworks for energy communities

In the absence of clear definitions and enabling frameworks, ECs often face heavy administrative burdens and encounter difficulties in safeguarding the democratic and social aims of the EC movement. They may also find it hard to obtain or access vital data and resources needed to meet legal and policy obligations to support project planning and development. In worst-case scenarios, the staff time and costs associated with tracking down such information, eventually meeting requirements, or attempting to influence policy can undermine the viability of business models that place delivering social value over earning profits.

To advocate for change when ineffective policies were uncovered, CEES Partners wrote letters to policy makers and political leaders, outlining the problems and possible solutions. In each country, CEES Partners also participated in diverse local and national events, and organised high-level policy meetings. Actively engaging in such dialogues created an opportunity to convey knowledge they have acquired by having close relations with the 'experts' who are most often underrepresented – i.e. those facing situations of energy vulnerability. Helping other stakeholders and policy makers understand the persistent policy barriers can trigger more effective action to address them.

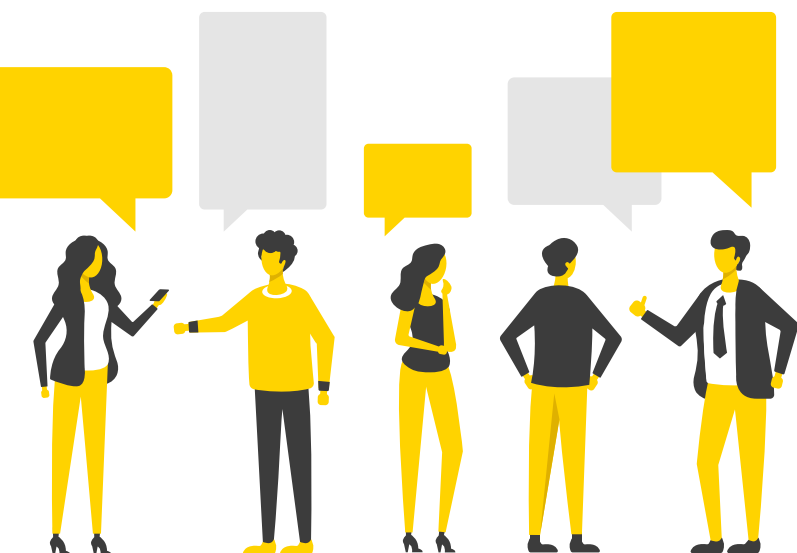


TIP FROM RESCOOP.EU COMMUNITY? COOPERATIVE? UNDERSTANDING LINKS BETWEEN STRUCTURES AND FRAMEWORKS

Across Europe, cooperatives are defined as groups of people who organise themselves to meet their common social and cultural needs and aspirations. Traditionally, it is one of the most common and solid legal forms under which to establish an EC. In principle, ECs can have diverse legal forms such as non-profit associations, social impact enterprises, partnerships or limited liability companies.

ECs keen to practise energy solidarity may find that different structures support or constrain specific activities. As noted in Chapter 6 on Financing, for example, collecting financial donations may be more difficult for cooperatives as – unlike non-profit associations, charities or foundations – they cannot legally offer tax incentives.

Understanding the pros and cons of different legal entities within local and national contexts is critical for how ECs operate and practise energy solidarity. Some ECs find that setting up separate legal entities for technical operations and community engagement delivers benefits that make up for additional time and staff costs.



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While progress is slow overall, some inspiring practices are coming to the fore across Europe. In the recent funding call for ECs in Just Transition areas (under the Recovery and Resilience Facility), Greece focused on collective self-consumption projects to combat energy poverty. Lithuania and Latvia are using a similar approach to 'tie' funding calls with broader strategies to tackle energy poverty.³⁴ Showcasing inspiring practices from other Member States is tremendously valuable for demonstrating what is possible and applying a degree of peer pressure.

34. <https://rescoop.eu/toolbox/repowereu-the-seeds-are-planted-now-the-persistent-gardening-begins>



Case study. How policy frameworks can help or hinder ECs and energy solidarity

In Greece, legislation on ECs was one of the first examples to enshrine tackling energy poverty as a primary purpose of their existence. More recently, in Law 5037/2023, new definitions of renewable energy communities (RECs) and citizen energy communities (CECs) make no mention of obligations to alleviate energy poverty. Many existing ECs find this worrisome, as new actors entering the field may not have energy solidarity as an underlying principle and will not have the same obligation to deliver social benefits through their business models. On a more positive note, the revised regulatory framework allows ECs to include energy vulnerable households within 'energy sharing' projects – at no cost to the households. In such cases, other members subsidise any related costs. Many Greek ECs have already applied this model and have substantially helped households across the country.

The Belgian city of Eeklo is an outstanding example of how social and energy policy can reinforce (rather than subvert) each other's aims. Recognising that lower energy bills will leave low-income families with more disposable income, thereby making them less dependent on social services, the city pre-finances the cost of shares that allow such households to participate in ECs. A payback mechanism is built into energy bills, which essentially links it to the cost savings that households benefit from by joining the EC. To keep the monthly cost low, the payback period is typically over 10 to 15 years.

But not all policy examples are so positive.

In Portugal, CEES Partner Coopérnico found that current 'social tariffs' – which were implemented to alleviate the burden of high energy bills for vulnerable households – actually result in a lock-in effect and discourage such people from joining an EC.

In Croatia, ZEZ brought to the attention of CEES a current regulation under which being a member of an EC is considered a personal 'asset', which may cause households in energy vulnerability to risk losing the social benefits on which they rely.

Additional inspiring cases of how governments (at various levels) are implementing relevant provisions, which can support discourse and recommendations, are available through the following links:

- [CEES: Aligning policy to support a just, clean energy transition](#)
- [JRC: Energy Communities and Energy Poverty](#)
- [European Commission Recommendation and Staff Working Document on Energy Poverty](#)
- Energy Communities Repository / [Report: Barriers and action drivers for the development of energy communities & their activities](#)

Legal and policy frameworks for energy poverty

As outlined in Chapter 1, energy poverty is very context-specific, reflecting a wide range of underlying causes and eventual impacts. For this reason, legal and policy frameworks need to be strategically planned and implemented at both national and local levels.

In countries that lack a clear definition of energy poverty, relevant policies and effective indicators, it can be extremely difficult to identify the people in situations of energy vulnerability who would most benefit from interventions. In the absence of such data, it is also difficult to monitor or measure the impacts of solidarity actions.

Low awareness of energy poverty and how it causes injustices to some groups in society can also undermine the work of ECs. Initially, it can make it difficult to secure support – whether from government, funders or the general public – for taking action on the part of people in situations of energy vulnerability. Later, it may mean that these groups fail to grasp the importance of energy solidarity measures and recognise the value of efforts undertaken by ECs.

ECs should not feel 'paralysed' by the lack of effective policy or data on energy poverty or the absence of solid monitoring and assessment systems. Rather, they should take action where and as they can while also advocating for change at the political level.

While acting in something of a vacuum is likely to create challenges in terms of human and financial resources, it is crucial to begin demonstrating the need to address energy injustices and the value of solidarity approaches. As outlined in Chapter 4, ECs can start by identifying and engaging with other entities that provide services to people in situations of vulnerability to, in turn, identify and engage with such households either directly or indirectly. Several resources are available to help ECs plan, implement and evaluate their own efforts.

- [National energy poverty indicators \(Energy Poverty Advisory Hub\)](#)
- [EU measures to tackle energy poverty](#)
- [European Commission Recommendation and Staff Working Document on Energy Poverty](#)



Vigilance is warranted as policies evolve

The past two years have demonstrated how quickly the European Commission and its Member States can dramatically revise energy policy – for better or worse. As these frameworks are never set in stone, ECs should actively monitor their evolution.

As it takes a substantial amount of time to plan and develop both EC projects and energy solidarity mechanisms, uncertainty in policy and regulatory frameworks can diminish the ability of ECs to achieve their goals. In addition to keeping abreast of policy changes, ECs should actively advocate for regulatory stability. Still, as some degree of uncertainty must be expected, they need to build resilience strategies into their own planning.



Case study. Recent revisions to EU packages amplify support for ECs

In adopting (in 2021) the EU Climate Law, the EU formally committed itself to reducing Europe's net greenhouse gas emissions by at least 55% by 2030. To achieve this ambitious target, the Commission tabled substantive revisions to climate and energy policies within the framework of the [Fit for 55 Package](#).

In the wake of the fossil fuel crisis triggered by Russia's invasion of Ukraine (2022), the EU rapidly ramped up ambitions and targets for renewable energy and energy efficiency, launching [REPowerEU](#).

Almost three years later, most of the related negotiations have been concluded. Several that have implications for ECs and for energy poverty warrant specific mention:

- [The Revision of the Electricity Market Directive](#) introduced a definition of energy sharing and provisions to support it. The Revision specifically includes a mandate to the Commission to issue guidance to Member States on energy sharing and on ensuring a level playing field for RECs and CECs to engage in this activity. Other provisions specify that Member States shall: a) take appropriate and non-discriminatory measures to ensure that energy poor and vulnerable households can access energy-sharing schemes; and b) should specifically ensure that energy-sharing projects owned by public authorities make the shared electricity accessible to vulnerable or energy poor customers or citizens.
- [The Energy Efficiency Directive \(EED\)](#) for the first time establishes a EU-wide definition of energy poverty and obliges Member States to set out energy efficiency obligation schemes that will achieve mandatory energy savings. The provisions stipulate that such schemes should prioritise people affected by energy poverty, vulnerable consumers, people in low-income households and people living in social housing. To achieve these energy savings, Member States must consider and promote the role of ECs.
- [The Social Climate Fund Regulation](#), designed to mitigate adverse impacts of carbon pricing on vulnerable households and transport users, opens new avenues for dedicated support for energy projects that deliver social impacts. The Regulation highlights the importance of grassroots efforts and local knowledge in driving impactful change and recognises the instrumental role ECs can play in fulfilling the Fund's goals.

REScoop.eu has collated a full overview of where and how ECs are mentioned in the recent round of climate and energy policy revisions – and the deadlines by which Member States should transpose the new provisions.

- [Second generation EU legislation for energy communities](#)

The fact that EU-level directives, targets and obligations have been put in place and/or strengthened in recent times can help ECs lobby

for stronger efforts to develop national and local strategies, regulations, policies and action plans.

Different activities raise different legal and regulatory challenges

One of the indicators by which CEES has assessed each mechanism in its Energy Solidarity Toolkit is 'ease of replication'. Among other elements, this indicator reflects whether implementing a specific mechanism is likely 'bump up' against heavy regulation or be subject to a complex web of rules, laws and regulations (which may vary from country to country).

As is evident in Chapter 5: ACT, some solidarity mechanisms are fairly easy to implement. Others will require ECs to develop a degree of expertise in laws and policies linked to planning permissions, financing, insurance, volunteering, safety and security (in office facilities or on construction sites)... the list goes on.

Developing the ability – which may include defining specific indicators – to evaluate an EC's capacity to manage regulatory compliance is critical. It implies being able to understand complex aspects of the regulatory environment and to estimate the human and financial resources required to do so.

ECs operating in the EU context should not feel they are doing so in isolation or need to solve every challenge they encounter single-handedly. In the decades since the first ECs were established, a wealth of collective knowledge and experience has been built up. And all ECs recognise the value of practising solidarity among themselves.

RESCoop.eu or national EC federations are a good starting place to seek advice; other ECs in a given country may be well-versed in local peculiarities. ECs should also raise the issue to policy makers of needing to build capacity across a wide range of technical and non-technical areas to support a truly just clean energy transition.



INSPIRING PRACTICE

FLEMISH EC ESTABLISHES SOCIAL IMPACT WORKING GROUP

In response to the EU-wide energy crisis and rapid changes it triggered in energy systems, REScoop Vlaanderen (the Flemish Federation of Citizen Energy Cooperatives) noted a growing ambition among its members to enhance their social impact. Recognising the need for and value of collective effort, in 2023, the Federation set up a Social Impact Working Group.

During regularly scheduled meetings, the Working Group invites members to share their initiatives and projects to tackle energy

poverty and enhance social justice in the Flemish energy transition. It also creates opportunity for external experts to provide insights on specific topics or themes.

In the first meeting, SAAMO, a civil society organisation active in tackling energy poverty, provided an overview of the situation in Flanders, as well as actions taken by the federal and regional governments, and the roles of local authorities and social services.

A few thoughts on internal policies for ECs

Setting clear, long-term goals that can be achieved by 'working through' a series of near-term objectives is fundamental to setting up ECs and to forging ahead with solidarity activities. Building in resilience implies allowing for an appropriate degree of flexibility along the way.

When it comes to the uncertainty linked to evolving policy and regulatory frameworks, staying informed is critical to resilience. Establishing strong stakeholder and advocacy networks – e.g. with

other ECs, energy poverty/justice NGOs, and local or regional authorities – will strengthen everyone's capacity to follow the full range of relevant frameworks. It will also empower solidarity partners to engage more effectively in dialogues about developing favourable and stable policy frameworks.

ECs also need to put in place solid risk management strategies. One key aspect in this regard includes boosting financial resilience by diversifying funding sources, which is covered in more detail in Chapter 6 on Financing.

8 / Meet the CEES partners

Over three years (2021-24), [Community Energy for Energy Solidarity \(CEES\)](#) sought to build knowledge and experience in relation to how energy communities (ECs) could effectively participate in tackling energy poverty in Europe.

Importantly, from the outset, the CEES Consortium was selected with an eye to reflect diverse agents of change. In addition to having 'typical' ECs – i.e. energy producers and suppliers – CEES brought on entities with proven approaches to identifying and engaging with vulnerable households to offer a wider range of services. As the definition of ECs becomes broader, this wide experience is invaluable for those planning to implement energy solidarity mechanisms.

Finally, recognising the challenges inherent in identifying and engaging with people in situations of energy vulnerability became evident, so did the importance of effective communications, knowledge sharing and efficient project management.



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ALLenergy



For over 20 years, ALLenergy has been working to alleviate energy poverty in northwest Scotland – a large and mainly remote rural region where many homes have no connection to the gas grid. In some areas, up to 50% of households struggle to stay sufficiently warm in winter. As homes are spread out, knowing who is most vulnerable is particularly challenging.

ALLenergy has found it effective to try to connect with people when they experience circumstances that increase their energy needs, or decrease their income, such that energy bills become a greater burden. Examples of trigger points include arrival of a new baby; bereavement; divorce or end of a relationship; diagnosis of a health condition; moving homes; and job loss or retirement.

To help identify such individuals, ALLenergy engages with multiple other frontline organisations such as housing associations, health and social assistance providers, debt advisors, food banks, etc. ALLenergy provides training to these organisations to help them to recognise energy vulnerability and refer clients to

ALLenergy for support. Links with health professionals are increasingly important as many physical and/or mental health issues are caused or made worse by energy poverty and difficult housing conditions.

Having identified and engaged with those who need help, ALLenergy advisors take their clients through a process including immediate crisis interventions as required, and a range of home energy advice and support to increase resilience to energy poverty going forward. As appropriate, they also refer clients to other organisations to help with other aspects of their lives.

CEES HIGHLIGHTS

Before the CEES project, ALLenergy was entirely dependent on grant funding to support its activities. Through CEES, ALLenergy has diversified its funding mechanisms through proactive marketing, direct dialogue and new collaborations, seeking public microdonations, larger corporate donations, referral fees, service agreements and commercial activities.

Through these new mechanisms, ALLenergy has successfully raised over €200 000 to support its activities. Importantly, by supporting more than 3 000 Scottish households, it has achieved more than €1 million in client gains.

Coopérnico



Coopérnico is the first and only renewable energy cooperative in Portugal. Founded in 2013 by a group of 16 citizens who wanted to invest their savings responsibly to generate renewable energy, it now boasts >6 000 members.

The cooperative provides assistance to charitable institutions and SMEs, which often struggle to pay their bills or secure loans from commercial banks. By installing solar PV on the rooftops of such organisations, Coopérnico offers an alternative energy supply model that provides energy at a fair price, leaving more financial resources available for delivering services to citizens.

Coopérnico also enables regular citizens to be owners of their own green energy power plants. In both cases, Coopérnico offers their customers advice on how to reduce energy consumption, thereby enabling energy cost savings, helping

to alleviate energy poverty issues and reducing carbon emissions.

This disruptive concept not only helps to create awareness about sustainability, but about electricity markets in general, while simultaneously democratising the production system. In turn, Coopérnico's cooperative model – which is non-profit making – offers investors a more attractive return than is available through traditional financial institutions. Coopérnico aggregates the performance results of all its projects and remunerates investors independently of the results of the specific project in which they invested.

Through a simple, mutually beneficial relationship, Coopérnico attends to the needs of both members and institutions while advancing an energy transition to a more sustainable future.

Since 2020, Coopérnico is also a non-profit electricity supplier/retailer. Coopérnico activity includes also counselling and advocacy for better policies and a more democratic and fair energy model. Coopérnico has been helping (legal and technical advice) members, municipalities and other organizations to create Renewable Energy Communities or collective self-consumption.

CEES HIGHLIGHTS

With the theme, *Gastar Bem a Energia* (Spend Energy Well), Coopérnico offered 18 workshops / Energy Cafés, directly reaching more than 350 people. The events were hosted in liaison with senior academies, municipalities, local parishes and an energy agency.

In the Energy Cafés, Coopérnico presented how energy billing works, ways to save energy and reduce costs, and tips to increase thermal comfort through simple, low-cost measures. Adapting to hesitancy on the part of participants to allow Energy Advisors to carry out home visits for customised assistance, Coopérnico distributed 'energy boxes' at later

workshops. Participants expressed appreciation for the opportunity to learn more about energy, which boosted their confidence, and for being given tools to improve their situations. By July 2024, Coopérnico had also offered personalised contacts to ~20 households and carried out 20 home visits (separately from the workshops), with more scheduled in the near future.

Coopérnico engaged with the former POWERPOOR Network of Energy Supporters and Mentors to continue providing (through CEES) energy counselling and advice, and to help apply for public financing for home renovations and energy efficient equipment.

Enercoop



Enercoop is a network of 11 local cooperatives in France that aims to empower citizens, communities, public entities and companies in the energy sector.

Enercoop is a cooperative producer and supplier of 100% renewable electricity, aiming to ensure universal access to renewable energy at a fair price. The cooperative advocates for and promotes ethical and responsible sourcing through a short supply chain and active support for the renewable energy sector. It offers an independent and transparent cooperative model that helps to ensure a local and citizen-based presence. Enercoop also offers energy saving services to its clients.

To go further against energy poverty, Enercoop created in 2017 an endowment fund, *Énergie Solidaire*. It employs innovative methods to collect donations, especially micro-donations and energy

surplus donations, and subsequently allocates them, through calls for projects, to local non-profit organisations. By addressing this issue, *Énergie Solidaire* aims to mitigate the adverse impacts of energy poverty on both the climate and the physical and psychological well-being of those affected.

CEES HIGHLIGHTS

Within the context of CEES, Enercoop conducted an experiment to establish an Energy Solidarity Taskforce, aimed at supporting its customers in energy poverty. Ultimately, this experiment resulted in the development of a new service, dedicated entirely to assisting customers in challenging situations, whether energy, economic or housing related. In addition to helping customers with their energy bills, the service enhances their connections with relevant social services.

Enercoop, supported by *Énergie Solidaire*, played a significant role in gathering information on financing energy communities to implement energy solidarity initiatives. They highlighted innovative, replicable solutions for Europe and identified the most robust traditional methods for supporting this type of structure.

Repowering London



Established in 2013, Repowering London creates clean, local energy by delivering renewable energy projects that are led and owned by local communities in London. These projects provide direct benefits to communities, including cost savings and community investment. They also generate 'social energy' by bringing people together and creating opportunities for communities to flourish.

Repowering London's unique combination of mentoring, training and work experience helps London residents become active, empowered citizens who have a voice in local decision making and a hand in delivering meaningful change to the existing energy system. We believe that coming together around creating local energy creates healthier and happier communities.

In parallel, Repowering London uses its collective experience to explore innovative models for providing sustainable and affordable urban energy and driving London's transition to a fair and inclusive low-carbon society.

CEES HIGHLIGHTS

As a primarily grant-funded organisation, Repowering London's pilot project for CEES aimed to test and tailor a micro-donations mechanism, inspired by Enercoop. In parallel, it would investigate other alternative fundraising mechanisms as necessary.

Over the course of the pilot, this came to involve three main activities:

- working with a coalition of community energy stakeholders in London on a public crowdfunding campaign;

- seeking donations from businesses through their corporate social responsibility programmes; and
- ultimately securing a new service contract to deliver fuel poverty initiatives.

Drawing together its established practices, Repowering London also launched a new energy support roadshow to provide energy advice in the district of Lambeth.

REScoop.eu**REScoop.eu**

REScoop.eu, the European federation of energy communities, is the umbrella organisation supporting a growing network of 2 250 energy communities, representing more than 1.5 million citizens.

In addition to providing energy services, REScoop.eu and its members empower citizens and cooperatives to practice energy democracy, creating platforms that allow citizens from all walks of life to participate in the European energy debate.

Recognising that, ultimately, citizens will foot the bill for a transition to a more sustainable energy system, the federation has four primary objectives:

- Represent the voice of citizens and energy cooperatives to European policy makers.
- Support starting and established energy cooperatives and provide them with tools and contacts to help them grow and prosper.
- Facilitate international exchange and cooperation among energy cooperatives.

- Promote the cooperative business model in the energy sector.

CEES HIGHLIGHTS

By closely following the CEES pilot projects, including obstacles encountered and lessons learned, REScoop.eu was able to formulate concrete policy recommendations for both the EU and national level (for countries in which the project was active). Over the project timeline (2021-2024), this has led to the development of a number of policy briefings that advocate for empowering citizen-led measures against energy poverty and for a just transition. Those recommendations were shared and discussed in dedicated national and EU-level policy events organised by CEES.

Additionally, REScoop.eu took the lead on building capacity among ECs beyond the CEES consortium. In a series of dedicated 'Open Days' over the course of the project's final year, CEES Partners have shared insights and concrete tips with numerous EC from across Europe, including Italy, Greece, Belgium, France and Slovenia. This experience greatly emphasised the importance of knowledge sharing within the wider movement and broadened REScoop.eu's view on the opportunities and obstacles ECs are experiencing when it comes to enacting social and energy justice within and beyond their communities.

Les 7 Vents

Les 7 Vents is a 'cooperative of collective interest' in Normandy, France (established in 2005)³⁵ that deals with energy and sustainable development in local and European contexts. Its main goal is to facilitate collaboration and cooperation among

businesses, artisans, citizens and communities, leveraging the diverse expertise and perspectives they each bring to local challenges.

The goal is to improve residents' comfort by providing them with support for self-eco-renovation projects of their dwellings, organising and managing mutual help between construction companies, volunteers and residents. This practice is called 3SR (Shared and Supported Self-Renovation).

35. From 1998 to 2005, Les 7 vents operated as a not-for-profit association, acting on the same matters.

ZEZ / Green Energy Cooperative



Green Energy Cooperative (ZEZ) is a nonprofit cooperative promoting community energy in Croatia for over 10 years. We believe that citizens should be at the center of the energy system and participate equally in managing local energy resources. We have successfully implemented first community energy projects in Croatia and are working to empower community energy in our country. We are a member of REScoop.eu, an association of over 2000 European energy communities. Our mission is to help citizens in the development, investment, and use of renewable energy sources, mostly focused on solar energy.

Through a support program for citizens, ZEZ aims to bring innovation into a sector that has been stagnating and utilise small-scale solar to deliver multiple benefits for local communities. ZEZ's overarching aims include: cutting energy costs in households, bringing new skills and jobs, and enabling the just energy transition.

ZEZ's mission is to help citizens develop, invest and use renewable energy sources. Our goal is to achieve real changes in the development of energetics and the involvement of citizens in the process of energy transition. We want to enable citizens to participate in planning, decision-making, construction and energy production, as well

as to participate in profit sharing. Through our activities, we encourage the development of social entrepreneurship in the energy sector, we influence social equality and protection of the environment. We develop concrete and sustainable solutions that enhance the development of your local community.

Our experts have experience in the development of new, innovative economic models for the use of renewable energy sources, and those models are your models – adapted to the needs and problems of your local community. Through our activities, we encourage the development of social entrepreneurship in energy, influence the equality of society, and preserve the environment. We develop concrete and sustainable solutions that improve the development of the local community.

CEES HIGHLIGHTS

Through the CEES project, ZEZ had the opportunity to further develop mechanisms already in place for alleviating energy poverty while testing new mechanisms to enhance our efficiency in increasing the energy efficiency of vulnerable households.

In launching the 'Ease their pain' campaign, ZEZ was able to raise awareness of energy poverty and boost public engagement in tackling it. Notable activities included successfully raising sufficient funds to prepare and deliver up to 250 Energy Efficiency Kits and being featured on various radio and TV programmes.

Together, these achievements advanced ZEZ's goal to contribute to achieving energy equity and just energy transition for all.

University of Birmingham



UNIVERSITY OF
BIRMINGHAM

The University of Birmingham (UoB) team was led by Dr Rosie Day, Associate Professor in Human Geography, in the School of Geography, Earth and Environmental Sciences at UoB. Other members of the UoB team were Professor Harriet Thomson (June 2021 to July 2023) and Dr Kevin Burchell (September 2021 to August 2024). Dr Florian Hanke, employed through SNAP!, also joined as a UoB associate to support their work (March 2024 to August 2024).

The UoB team had several roles in the CEES project. First, UoB was responsible for conceptual development within CEES and ensuring that the CEES work was informed by current understanding of key concepts – such as energy poverty, energy communities and

energy solidarity – from academic and 'grey' literature. Second, it led on the implementation of quantitative and qualitative research into the current engagement of European energy communities in energy solidarity actions.

In turn, the UoB team was responsible for evaluating six pilot projects carried out by other CEES Partners. This involved developing an Evaluation Framework, implementing evaluation methods (with extensive support from the six pilot project teams) and preparing a comprehensive evaluation report (available on the CEES website).

UoB also produced several academic outputs. It gave presentations at two notable academic conferences:

- **European Sociological Association Energy and Society Network International Conference:** Energy, Environment and Societies in Crises (6-8 September 2023, Trento, Italy)

- **35th International Geographical Congress** (25-30 August 2024, Dublin, Ireland).

UoB is also writing academic journal articles based on the CEES work.

In addition to these core tasks, the UoB team also contributed to CEES webinars and Open Days, participated in two CEES launch events in the spring of 2024, and joined the UK High-Level Policy Roundtable in summer 2024.

The Energy Action Project (EnAct)

ENACT

EnAct supported the CEES project by implementing an extensive communications strategy that had three overarching aims:

- boost understanding of energy poverty in the European context
- highlight the role of ECs in practising energy solidarity to deliver energy justice
- demonstrate the added value of the tools developed by the Consortium.

CEES identified three primary target audiences with specific aims.

- Strengthen the capacity of ECs to implement energy solidarity measures. Over the course of the project, CEES created opportunities for engagement, knowledge sharing and learning by doing. Publication of the Energy Solidarity Toolkit will promote wider uptake of mechanisms and measures to deliver a just, clean energy transition.
- Demonstrate opportunities and obstacles to the policy and stakeholder community. The ultimate goal of CEES is to demonstrate ECs as an approach to tackling energy poverty that can be implemented and scaled-up quickly, with mechanisms tailored to local contexts.

To this end, the project reported on progress with supporting data and recommendations for policy, regulation, financing, etc.

- Energy users, including those in energy poverty. To uphold the principles of energy solidarity, CEES sought to help build energy knowledge and know-how among EC members. Content for this audience sought to help people understand energy, their options when using it, where to seek information or assistance, and ways to participate in energy decision making, including at community and political levels.

CEES HIGHLIGHTS

EnAct supported CEES Partners with an extensive social media campaign, highlighting their activities and achievements throughout the project. This activity attracted the attention of other ECs, providing insights and advice relevant to their own projects.

In turn, EnAct also organised four webinars at key points in the project and distributed four newsletters, each time building up a broader network of followers.

Finally, working closely with all Partners, EnAct led the development of the CEES Energy Solidarity Toolkit, the project's key legacy. Packed with information, insights, inspiring practices and concrete tips, the Toolkit will be of immense value for other ECs seeking to integrate energy solidarity measures in support of just, clean energy transition.

SNAP!

SNAP!

Founded in 2017, SNAP is a boutique company based in Lisbon, Portugal, that specialises in innovation consulting, as well as accelerating and funding the development of it, working at European and international scales.

SNAP oversaw the overall management of the CEES project, such as risk management and legal consulting. Applying experience with previous H2020 projects – e.g the **Citizenenergy IEE** and **REScoop Plus** – SNAP coordinated the following:

- financial administration of the project and its funds.

- smooth and timely communication with all European Commission officials.
- completion of all reports and financial statements.
- replication of the Energy Solidarity Toolkit, working with REScoop.eu

To fulfil its role, SNAP worked with a team of experienced project managers and entrepreneurs with a strong background in sustainable energy – namely, cooperative and crowdfunding projects and project finance.

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CEES has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No. 101026972.

