European Social Catalyst Fund

SUITE

SCALING UP INNOVATION TOGETHER FOR ENERGY VULNERABILITY

This project has been supported by the European Social Catalyst Fund which has been established and co-funded by the European Union's Horizon 2020 Research and Innovation Programme, Genio, the Robert Bosch Stiftung and the King Baudouin Foundation

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Executive Summary

Energy poverty is a growing issue in many countries along Europe, by 2018 a 6.6% of the population have arrears on utility bills, and 7.3% were not able to keep their homes at comfortable temperature. Additionally, on 2015, a 16.2% had a share of energy expenditure in income more than twice the national median share (2M indicator)[1]. It is worth noting that energy poverty is a key priority issue to all European countries due to the energy transition that Europe is going through, with the objective of not leaving anyone behind.

In this line, SUITE, one of the 7 projects financed by the European Social Catalyst Fund[2] (ESCF), a new initiative designed to have significant impact over some of the Europe's most pressing social challenges, aims to design a strategy to scale up a proven social innovation, the **ASSIST model**[3] funded by the H2020 programme, which aimed to reduce energy poverty (EP) by providing training and creating a network of operators on the ground (such as social operators). The ASSIST methodology consists of TRAINING operators to create a strong and multisectoral NETWORK to take ACTION by providing energy advice to people under situations of energy poverty and/or vulnerability.

Along the implementation of ASSIST (2017 – 2020) it was possible to proof the effectiveness of the model, a model that emphasises on the emotional bond that exists between operators and the end-users. By providing specific training to operators from different sectors it was possible to reach energy poor people that would not have been reached by other means. The ASSIST model created the **Household Energy Advisor** (HEA) figure, which acted as a unique contact point on energy poverty, able to advice on all issues. This way, the project was able to engage a total of 5.242 consumers with ASSIST actions.

Along the SUITE project (2021) each country's specific context was analysed and key stakeholders, both from the public and the private sector were consulted in order to better define and assure the viability of each of the presented models. Thus, based on the project partners and subcontractors experience and in the collected information five scalability plans were designed, one for each of the involved countries, starting with Italy, followed by Hungary, Spain, Poland, and Romania.

This document presents two detailed plans having a **national coverage,** being Hungary and Italy, in the concrete case of Hungary even though the initial intention is to start small (regional), the collaboration with national partners is foreseen, therefore resulting in a plan with a "national" coverage, which will build the network of energy agents from zero by putting together organizations from different sectors. In the case of Italy, the intention is to increase the geographical coverage with respect to the implementation of ASSIST, by focusing on a two-legged model designed to work in synergy but with specific objectives, targets, and activities; one for the public sector addressing and self-funded by municipalities (the ASSIST-PA model), and one for operators on the ground financed by the private actors (the RETE ASSIST-TED model).

1 Indicators and Data from the European Energy Poverty Observatory https://www.energypoverty.eu/indicators-data

2 European Social Catalyst Fund - https://www.euscf.eu/

3 ASSIST project (H2020) - http://www.assist2gether.eu/

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Moreover, two detailed plans having a **regional coverage** are presented, one on the Barcelona Region (Spain) and the other on the Małopolska Region (Poland). The first model focused on creating a virtual Energy Poverty Office for telecare and home care professionals, so that they can refer to this office the detected cases of energy poverty after receiving the proper training; while the former model is focused on reactivating the existing HEA Network and enlarging it by training more social operators, living open the possibility of engaging with the neighbouring region.

Finally, there is a fifth plan, nevertheless this plan is having a **local coverage,** concretely in the Municipality of Cluj-Napoca (Romania), which will be implementing nearly from zero with the intention of building a local network of energy agents belonging to different sectors. Additionally, by the second year, the model conceives the idea of piloting a one-stop-shop, considered as a good complimentary solution for addressing energy poverty; the one-stop-shop represents a one step further for institutionalizing the energy advisors' network.

The project consortium who has worked on the elaboration of the presented scalability plans, counts with representatives of the key sectors that were aimed to be reached for the collection of valuable information, essential for the proper design of strong and reliable scalability plans: **Ecoserveis** (Energy consultancy, highly experienced in energy poverty and project coordinator), **AISFOR** (private company, highly experienced in energy poverty and coordinator of the ASSIST project), **Climate Alliance** (Network of municipalities and districts covering 27 European countries, providing its knowledge for reaching the public sector), and the **Catalan Energy Cluster** (Network of companies, providing the necessary link with the private sector). Additionally, to have a context centred approach in the elaboration of the plans in Hungary, Poland and Romania, the project counts with the participation of **Climate Alliance Hungary,** the **Polish National Energy Conservation Agency** (KAPE), and **The Centre for the Study of Democracy** (CSD)/ Babes-Bolyai University, respectively.

Project partners

coordinator

ecoserveis

CEEC Clúster de l'Energia Eficient de Catalunya

AISFOR

Climate Alliance

Collaborators

ASSIST 2GETHER

Éghajlatvédelmi Szövetség

KAPE Krajowa Agencja Poszanowania Energii S.A.

CSD

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Objectives and Methodology

General objectives

The overall objective of the SUITE project is to **develop five Scalability and Delivery Plans** for a proven social innovation, the ASSIST model, a model which aims at reducing Energy Poverty through on the ground operators. Three of the Scalability Plans will be developed in countries which were already part of ASSIST, Italy, Spain, and Poland; while the other two will be elaborated in new countries, Romania and Hungary. It is worth noting, that each of these scaling-up strategies are drawn independently, meaning that each of them pursues specific objectives and have set specific indicators, nevertheless all of them underlying under common general objectives:

1. Understand and represent the **specific local context** in a realistic manner.
2. Count on the **support,** both financial and non-financial, of key local, regional or national stakeholders.
3. Design a ready-to-use plan for the **further implementation** of such social innovation for tackling energy poverty through social operators.
4. Set the basis for the creation of a **harmonized European Network of energy agents tackling energy poverty,** putting together already existing initiatives with new ones, fostering synergies and raising awareness over an increasing issue affecting people all over Europe.

As stated, each Scalability Plan has defined concrete objectives and indicators (see Annex 1) to fulfil both in the long and in the short term, together with a detailed strategy on how to achieve them. Moreover, monitoring and controlling, both the implementation process and the performance of all activities, is common for all pilot countries as a way of assuring the quality of the developed models and its sustainability over time.

Methodology

Building the Scalability Plans

When starting the project, one of the first questions to answer was *"How to define the scaling models in each of the countries considering any existing constraints in terms of resources, namely time?"*. Therefore, the choice was between whether:

1. Having **focus groups and interviews** with all relevant stakeholders to work together on how and what to scale. Even though this option may have had very positive feedback, it would have required a lot more time, and time was very scarce. It is worth noting, that in the case of Italy, for defining the ASSIST-PA model (involving municipalities) it was better to follow a bottom-up participatory approach.
2. **Define a possible scaling model** between the project partners considering the specific context of each of the pilots and then organize focus groups and interviews with all relevant stakeholders to present a **proposal for further improvement**

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and validation. Since, two of the project partners were part of the ASSIST project and had the experience and knowledge of it, plus the project counted with representatives of each of the pilot countries who knew their territory, this option was the chosen for all scalability plans.

For the development of the different Scalability Plans, a common methodology has been applied. On the one hand, the **existing evidence** obtained by the implantation of the ASSIST project, helped setting a general common understanding on how the idea of tackling energy poverty through operators was perceived, together with the identified successful outputs to be exploited and the main barriers to be overcome with new strategies and approaches. This initial peer-to-peer learning was done through online meetings and by working together in brainstorming sessions with Mural, an online collaborative tool. The results of these sessions were the initial scaling idea for each country.

Besides, all pilots had to identify and contact key stakeholders for their model, both from the public and the private sector, since one of the main barriers identified in ASSIST was the dependence on funding coming from different programs, therefore, involving the private actors was one of the main challenges of the SUITE project. These key stakeholders vary a lot between countries, since the energy poverty topic is conceived in a different manner along Europe, even though it exists everywhere. Then, at least one focus group session and ten interviews with key stakeholders were organized and conducted in each of the pilots to improve the initial scalability idea according to the local context for it to be realistic and sustainable in the long run.

In parallel, as each country was working on its own scalability and delivery model, an **EU-survey was launched** in order to measure the acceptance level and the need of a harmonized European Network for tackling energy poverty. The survey was available for one month and was mainly shared among Climate Alliance members in order to reach public authorities, key stakeholders to all pilots, that otherwise were hard to reach. The obtained results were very positive, where a cross-sectoral collaboration on all levels was highlighted. Moreover, the results shown that the main barriers are aligned across countries, which can be negatively seen since in the majority of cases funding is a big issue together with the lack or poor existence of a common definition of energy poverty and a specific department addressing it. Nevertheless, the fact of sharing the same barriers shows a joint need and opens the door to the possibility of building a common system that can help overcoming these barriers in the different European countries. (See **Annex 2**)

Finally, scalability plans were drafted by putting together all collected information and having as a solid and strong support the overall EU interest in the proposed social model, by opening the possibility of creating a European Network of energy advisors tackling energy poverty. In order to verify this opportunity a European co-creation event was planned for the 5th of July.

SUITE

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PLAN WITH A NATIONAL COVERAGE

HUNGARY

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NATIONAL **COVERAGE PLAN**

HUNGARY

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Analysis of the Local context

According to the EU-SILC survey, the Household Budget Survey and the data of the National Statistical Office (KSH), in 2019, 5.4% of households reported that they were unable to keep their homes adequately warm in winter[1]. In parallel, with the implementation of the utility price reduction programme and the general recovery from the financial crisis, it started to drop and now it is at a record low level (5.4%). The number of households with arrears on utility bills peaked at 25% in 2012 and fell to 10.2% in 2019. These data do not reflect the effects of the economic crisis emerging due to the Covid-19 pandemic.

The median share of energy costs in the total expenditure was 12% in 2015, when most households spent 10-15% of their income on energy[2].

Hidden energy poverty is less severe in Hungary than in the EU on average: the rate is only 9.3% compared to 14.6% in the EU[3]. Nevertheless, regional inequalities within the country are of particular concern. According to a recent research by *Rural Living Lab – Step-in project,* in the southern and eastern regions of Hungary energy poverty rates can exceed 50%, especially in small villages with a high share of Roma people in the population.

According to Habitat for Humanity Hungary's housing report from 2020, the social groups most vulnerable to energy poverty are single pensioners, the unemployed, families with children, and single-parent families[4]. Based on the analysis of the recently published findings of the Com-Act Project, following two different methodologies in defining energy poverty indicators, two different figures indicate the share of households affected by energy poverty:

- According to the 2M method, 10% of Hungarian households were considered energy-poor: this share included twice as many single households as the average population, comprising half of all the energy-poor households.
- The other definition applied was the Low Income High Cost method (LIHC), according to which energy-poor households are those which spend more on energy than the median, and whose income remains under the poverty line after this expense. Based on the LIHC indicator, 21% of Hungarian households are considered energy-poor.

Within the poorest income quintile, almost 40% of the households use firewood for heating. As the utility price reduction programme does not include solid fuels, it means that the most vulnerable receive much less support from the state for covering their energy needs than those who use modern energy services, regardless of their social status.

1 Eurostat, "Inability to keep home adequately warm – EU-SILC survey," 2021.

2 *N. Feldmár, "Energiaszegénység," in Évesjelentés a lakhatási szegénységről 2020 [Annual Report on Housing Poverty 2020], 2020, pp. 42–56.*

3 Energy Poverty Observatory, "Member state report – Hungary," p. 4, 2018.

4 *N. Feldmár, "Energiaszegénység," in Éves Jelentés a lakhatási szegénységről 2020 [Annual Report on Housing Poverty 2020], 2020, pp. 42–56.*

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Nowadays, within the Hungarian government, there is no designated ministry responsible for energy poverty and housing. The Ministry of Innovation and Technology is involved in many aspects, partly also the Ministry of Interior (e.g. social fuel wood) or the Prime Minister's Office (in connection with energy efficiency renovation); many people work in different related topics but there is no unified governmental concept on energy poverty/energy/housing.

According to the National Energy and Climate Plan (NECP), energy-poor households are households that spend more than 25% of their disposable income on energy, which roughly corresponds to double the median energy expenditure (2M). The NECP mixes the use of terms by mentioning households 'affected by energy poverty' and 'vulnerable consumers' in the same way. The government's interventions against energy poverty will be targeted at a) families with multiple children living in single-family homes in small settlements; and b) single pensioners in multi-apartment residential buildings.

According to the NECP, the Hungarian Government intends to continue the 'Utility price reduction' programme as a major policy instrument supporting the affordability of energy. Beyond this, the most highlighted interventions to be implemented are the support of smart devices and decentralised heating systems, the installation of prepayment meters, educational and communication campaigns, and the introduction of an Energy Efficiency Obligation Scheme (EEOS). There is no detailed public information available about the Hungarian implementation of the Recovery and Resilience Facility or the Renovation Wave, or how Hungary intends to handle the question of energy poverty.

How Energy Poverty is currently being tackled in Hungary

In Hungary, energy-poor people are currently supported in two ways:

- As vulnerable consumers via social benefits and direct reductions of their energy costs.
- As recipients of the utility price reduction programme without targeted energy poverty categories.

The vulnerable consumer status has been in use for a long time as the legal basis for social benefits for low-income consumers. Vulnerable consumers can request instalment payment for utilities, payment deferment or prepayment meters. The vulnerable consumer status is based either on extremely low income or physical or mental disability. There is also a socially targeted subsidy for firewood available for low-income people living in villages. In 2015 the Hungarian state withdrew from financing the housing allowance which was available for low-income consumers for covering housing or energy costs. Currently municipalities decide whether they will keep financing the allowance or not, which has resulted in a dramatic shrinkage of the programme. Even in settlements, where the municipality still provides the subsidy, the amounts are marginal due to the low budget conditions of municipalities.

Energy efficiency improvement and energy poverty reduction are not connected in Hungarian policies.

Moreover, Hungary counts with the National Energy Network, established in 2017, has the role to promote the energy-efficient operation of public institutions and businesses and to provide advice to the citizens on how to reduce energy consumption. When it was set up, it focused mainly on public institutions, with no significant provision of advice to the general public or businesses. Nevertheless,

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in the first half of 2021, the government is trying to reorganise their work, so the Hungarian Chamber of Engineers is taking over some of the tasks of the National Energy Network. On this basis, the Chamber provides free advice to the public and businesses from now on. The National Energy and Climate Plan strengthens the National Energy Network and foresees the provision of free online and face-to-face consultation services for the public, involving energy and engineering experts, economists and architects. Nevertheless, interviews suggest that the scheme is not yet well known.

Finally, several domestic NGOs have commented on the available version of Hungary's Recovery and Resilience Plan, unfortunately, several organisations felt that a stronger document would have been needed in order to have a higher impact over the Hungarian population. Additionally, the Habitat for Humanity HU has called on the government to include a comprehensive renovation programme for low-income households, and the National Society of Conservationists (member of Climate Alliance Hungary (CAH)) pointed out that the plan's entire energy component fails to mention an impact assessment despite the "do no significant harm" assessment being an EU requirement, plus the component in the version shared for public consultation did not include a budget. So, even though some specific regulations are starting to move, there is nothing concrete yet.

Innovation scalability proposal

For the first time, thanks to the attention on the theme of energy poverty, various NGOs, authorities and companies sat down to discuss the potential of an advisory network to be established. Due to the various backgrounds of the organisations, the time seems to be right to start building a HEA Network involving organisations with a different background but similar interests. As the theme needs further lobby and communication activities to raise awareness, the grass-root work of NGOs in collaboration with local authorities and nation-wide organisations offer the potential to direct the spotlight on the issues around energy poverty and start not only a dialogue towards establishing policy measures but also concrete actions directly benefiting energy poor households.

Moreover, the proposed model will allow introducing a collaborative concept of training solution for actors on the field. As the ASSIST training needs to be adapted to Hungarian circumstances, this also allows to introduce not only skills, knowledge and competences related to consultancy on energy poverty but also to match these with environmental learning issues and thus establish environmental consciousness, highly correlated with climate change, energy use and energy poverty.

Private sector potential

Energy poverty is a complex issue in Hungary, nevertheless, it is still a "new topic" and there is no dedicated system in place to deal with it. For Hungary it was the first time, as part of the SUITE Focus Groups sessions, to invite people from different sectors around the same table to talk about energy poverty, therefore there is a chance that more organisations could be involved because the relevant actors have started to talk about it.

There is still a lot of lobbying work to be done, since companies are relying on state regulations and even though companies may find the model interesting, they are not willing to be the first to start. The moment that regulations change, the role of private actors will be more likely to improve, since besides the regulations issue, the private sector seeks for the same sort of benefits seen in other countries:

1. Increase their visibility and improve their reputation. It gives them some assets and knowledge to explain to their stakeholders and their consumers/clients.

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2. Economic incentives opening the possibility to new contracts (commercial action).
3. Corporate Social Responsibility mechanisms.

Moreover, based on the interview with the EON utility and energy service company, there are advisory programmes that are regularly financially supported by EON. The fact that there exist advisory services funded by a private company can also be used as an example when talking to other private actors, it is believed that this will increase the possibility for reaching and involving them.

Finally, in order to secure the private sector potential, it will be essential to invite the Ministry and private companies to collaborate so that they could initiate a discussion about this issue.

Delivery Model

This Scalability and Delivery model will be at **national level** in Hungary, even though the initial intention is to start small (regional), the collaboration with national partners is foreseen, therefore resulting in a plan with a "national" coverage, which will build the network from zero. Therefore, to build the model, it is essential to involve **active civil society actors,** because (1) they have a well-established direct link to the target groups concerned and are open to being approached, and (2) because in Hungary there is lack of interest on behalf of the private sector, at least for now.

This model will be built by networking with organizations that already work in the social and civil society sectors, and will mainly consist of **building a network of different organizations** working on different sectors that share interest in energy poverty and energy efficiency. This network will work providing training to social operators, who will later provide assessment to vulnerable people. Since some of these organizations work with poverty and environmental issues, the model will also help **setting the basis for setting a common definition for Energy Poverty** including energy efficiency in Hungary and raising awareness about it.

In order to start with the model, the **next steps** will be followed:

1. Ensuring the conditions of operation, financial planning (definition and allocation of tasks, identification of resources, setting of objectives).
2. Selection of a coordinator, CAH would take on the task.
3. Further negotiation with key stakeholders to be involved. During the interviews, specific interest has already been expressed by: Habitat for Humanity Hungary; Hungarian Charity Service of the Order of Malta, Hungarian Network of Eco-counselling Offices (KÖTHÁLÓ); Energiaklub Climate Policy Institute, Climate Alliance Hungary members, nevertheless, no concrete arrangements have been done. Some of the potential stakeholders have stated that they need to know what the training material will be in order to accept to cooperate or be part of the network.
4. Transfer of training material to Hungarian context, translation into Hungarian. All training materials, tools and resources will be adapted from the existing ones of the ASSIST model.
5. Recruitment of consultants.
6. Training of energy consultants (2-3 per county).
7. Monitoring, evaluation, adaptation of training as needed.

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Objectives and functions

The main objective of the model is to implement the entire resources and methodologies from the ASSIST model at **national level,** meaning that after training materials are adapted and translated to the local language, this training will be launched through the established network of organisations in order to provide social operators with the specific knowledge to assess people suffering or in risk of suffering from energy poverty situations.

The trained energy consultants will be able to **identify situations of energy poverty and provide the necessary support** to the affected people. This support will not just include some tips for reducing energy consumption and on how to consume in a more efficient way, since studies have shown that precisely energy poor people tend to already have low energy consumption. Therefore, the energy consultants will also help people accessing other existing services and support programs which could help them more.

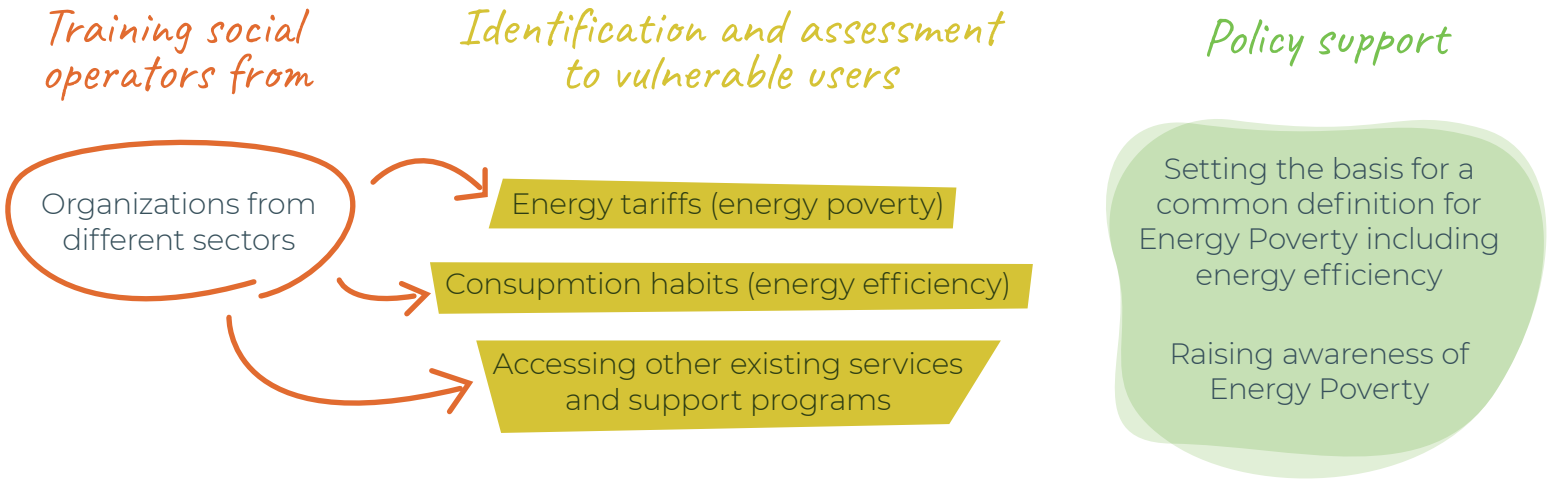

Figure 1: Network working structure

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Moreover, the model will try to continuously **bring together new organizations** to work together, and will increase their efforts in involving both the public and the private sector. At the moment, the public sector is interested, nevertheless, they do not count with the necessary resources to commit, and as for the private sector, lobbying work will be made and similar collaboration will be shown as an example to enhance their participation. Therefore, at first the intention will be to have a **public-private** model.

It is worth noting, that the creation of the **EU-network** (see "Potentiality of building a EU-Network of energy agents" and Annex 2) will act as a catalyser to enhance the participation of other actors, since the idea has had a great positive acceptance at European level by other existing initiatives and Hungary will be a pioneer to it, being one of the first national network of HEAs (Household Energy Advisor) to be part of it.

Stakeholders' needs covered by the model

Based on preliminary mapping, the following stakeholder needs have emerged and will be addressed by the proposed model:

1. **Training material in Hungarian** • One of the key elements of effective training is to provide participants with training material in Hungarian. This not only makes the task of the trainees easier, but in many cases it is also an essential criteria, as foreign language deficiency is a common problem in Hungary. If Hungarian language material is not available, the number of people who can be involved in counselling may be significantly reduced.

2. **Effective, tailor-made responses** • It is important that advisers are able to provide practical, rather than theoretical, and genuinely useful answers to the question/problem at hand, and that the answers are effective/feasible solutions in the given context. It is also important that the training material is adapted to the needs and problems of the different target groups. People living in extreme poverty, housing poverty, approach advisors with fundamentally different questions and options (or lack thereof) than a non-disadvantaged person/family living in energy poverty to some extent; this range is very wide. It is also important to differentiate between rural/urban/regional areas, as this also has a major impact on the problems and opportunities of target groups in different areas.

3. **Modules** • A ready-made, developed module or framework that responds to a given problem. It would be important not to leave it to the consultant to work out in detail an effective solution matrix. Obviously, personalised advice can be refined based on knowledge of local conditions, opportunities and interfaces, but a kind of "module database" would be useful.

4. **A secure operating base** • The structure of the HEA system in Hungary will need long-term, ongoing funding. Counselling can operate on a well-paid basis. That is way the model will be built by putting together organization that already work in the social and civil society sectors, and will try to get funding from different existing sources (see "Sustainability of the model")

5. **Defining the scope of action** • In a given assessment situation, it will be key to clearly define what is the scope and role of the HEAs, since it may be different for a social actor or an public administration official (e.g. a municipal employee or a public family support worker can be involved in the start-up of social assistance, whereas an NGO has no such right.)

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Procedure and offered services

1. Adapting and translating the training material according to the local context.
2. Introducing the Network and training scheme to the different organizations interested in being part of the National HEA Network. During this process, the different social operators will be trained to become HEA consultants.
3. The HEA consultants, belonging to different organisations, will reach the vulnerable users through different targeted communication activities (e.g. leaflets, media, and promotion to the public social network). Each of them according to the specific channels and means used by their organization. Moreover, they will make use of their existing databases and ongoing programs to reach users which are harder to reach.
4. Finally, services to vulnerable consumers will be performed by network partners, thus being independent from each other, resulting in different procedures and services according to the specific organization performing them. Nevertheless, all actions and services will be focused on addressing energy poverty and energy efficiency issues, even though depending on the organizations' expertise area they will be focusing more on some sort of actions and less on others.

The concrete workflow and procedures of the National HEA Network will be more defined when actually building the network, since concrete agreements will need to be reached with the different involved actors for the definition of the different responsibilities.

Offered services

- Energy contracts and Tariff's assessment (bills)
- Tips on habits at home for reducing energy consumption
- Information on existing public benefits user can access to

Training and accompaniment

As for the training, it is expected to train 50 advisors along the two years.

The training is planned to be 100% online, consisting of a course of between 25 and 35 hours depending on the necessary adaptations to be made to the Hungarian context. The course will be designed to provide the necessary resources and tools for the identification and proper assessment of energy poverty situations.

SWOT matrix

The following SWOT matrix is drawn taking into consideration the local context of Hungary, the expertise and lessons learnt from the implementation of ASSIST and all the input provided by the different actors participating in the focus group and interviews. It consists of the identification of Strengths, Weaknesses, Opportunities and Threats that will be included in the further overall analysis to help to determine different strategies to follow in the decision-making process.

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Strengths

- Easy to involve social actors.
- Direct access to target groups through already existing organisations.
- Direct contact of the involved organisations with people living in extreme poverty.
- Local/people knowledge of field advisors.
- Climate of trust.
- Useful experiences with Hungarian participants through international projects on energy poverty.
- Positive evaluation of the ASSIST model.

Opportunities

- The approach to energy poverty is still quite new, so there is an opportunity to contribute to laying the foundations.
- New European funding cycle.
- Awareness rising.
- New area of knowledge for consultants.

Weaknesses

- Limited involvement of municipalities.
- Limited domestic tendering opportunities.
- Lack of public energy awareness and knowledge.
- No designated "responsible person" in the public system for energy poverty.
- Turnover in the civil sector due to low salaries.

Threats

- Resource-poor municipalities (centralisation, COVID)
- Residential energy efficiency programmes and loans are not available to all, and do not reach those most in need
- Private sector involvement is a question.

Potential Users

As already stated there is not a unified definition for energy poverty in Hungary, but poverty levels are very high affecting vulnerable people in very different manners. In Hungary, energy poverty cannot be addressed without addressing housing poverty and debt management, in case of people living in extreme poverty.

A greater reach is likely to be achieved among those who have some financial resources to achieve energy-saving, energy-efficient solutions (e.g. creditworthy, eligible for public subsidy programmes, etc.).

In order to be able to reach vulnerable people, the model will make use of the existing NGOs and charities working on the ground with different types of poverty situations. This way, it is expected to reach **between 500 and 750 people.**

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Stakeholders Consultation

The aim of having a focus group session and interviews with different actors, representing different sectors that may play a role in the overall proposed model was to validate its viability. As already stated, the model pursues a **national coverage,** mainly counting on existing NGOs and charities that are already involved in counselling and field work.

With this purpose, interviews were held in April, May and June, while the focus group session was held on the 12th of May including different actors from different sectors.

Relevant information and data were gathered through internet research and analysis of different potential stakeholder groups and to better understand the general situation of energy poverty in Hungary. As a result, a list of potential stakeholders was compiled in Hungary, including NGOs, charities, municipalities, and professional policy institutes (NGOs). In addition, in order to obtain a more complete picture, the Ministry of Innovation and Technology, which is responsible for climate change issues, the Ministry's Research and Decision Support Office (National Adaptation Center - Climate Change Planning and Strategy Unit), a national energy supplier (EON) and a market analysis and consultancy company (Ariosz Consulting Ltd.) were contacted.

As the next table shows, the Scalability Plan was improved and validated by representatives of both the public and the private sector. Through the focus group session it was possible to contrast different points of view from the economic, the public and the social perspective, allowing to shape a plan that not only foresees for its sustainability but it addresses in the best possible way the existing needs of vulnerable people in Hungary.

Table 1:
List of participants to the Focus Group Session and interviews

11 people	12 people
Focus Group Participants	**Interviewed actors**
1. Habitat for Humanity HU	1. Habitat for Humanity Hungary
2. Hungarian Charity Service of the Order of Malta	2. Hungarian Charity Service of the Order of Malta
3. Hungarian Network of Eco-counselling Offices (KÖTHÁLÓ)	3. National Society of Conservationists – Friends of the Earth Hungary
4. Energiaklub Climate Policy Institute	4. Real Pearl Foundation
5. Municipality of Szeged	5. Hungarian Network of Eco-counselling Offices (KÖTHÁLÓ)
6. National Adaptation Center - Climate Change Planning and Strategy Unit (NAKFO)	6. Energiaklub Climate Policy Institute
7. Ariosz Consulting Ltd. (STEP-IN project)	7. Győr-Moson-Sopron County Local Government
8. Climate Alliance (CA)	8. Municipality of Szeged
9. Climate Alliance Hungary (CAH)	9. Ministry of Innovation and Technology (ITM)
	10. National Adaptation Center - Climate Change Planning and Strategy Unit (NAKFO)
	11. EON Energy Services
	12. Ariosz Consulting Ltd. (STEP-IN project)

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Based on the picture that emerged from the interviews conducted, the groups of potential stakeholders to be involved in the Scalability and Delivery model in Hungary are:

- **NGOs** – Actors active and experienced in advisory, awareness-raising and field work, well-established in the field (climate protection, social issues), with an established direct link to groups affected by energy poverty. Furthermore, organisations working on policy, research and surveys on energy/energy poverty. NGOs in Hungary are generally very resource-poor and project-dependent. National funding for NGOs is rather limited, so they seek international partnerships too. The head of KÖTHÁLÓ also participated in the interview; although this network is currently inactive due to lack of resources, it is **open to cooperation.** KÖTHÁLÓ was established in 1997 by experienced environmental NGOs providing free ecological advice to the general public, with 19 offices across the country, accessible in person, by telephone, and by e-mail.

- **Charities** – Active and experienced in consultancy and field work, well-established in the field, with a network with national outreach. It is able to reach mainly those living in extreme poverty, i.e. those most affected by energy poverty. The trust and experience already built up between the staff of the charity and the affected population allows it to provide effective advice. The Hungarian Charity Service of the Order of Malta, which has a close relationship with the State, as reflected in the support it receives and the tasks it performs, was involved in the interview. In February 2019, the Government launched a long-term, comprehensive programme called "Catching-up Settlements" to help the 300 most disadvantaged settlements to catch up, and appointed MiklósVecsei, Vice-President of the Hungarian Charity Service of the Order of Malta, as Prime Minister's Commissioner to lead the programme. The implementation of the programme is coordinated by the Hungarian Maltese Charity Service, with the cooperation of church and civil organisations (including the Real Pearl Foundation, interviewed during the interviews). The programme is still ongoing, with the municipalities being involved in phases: in 2019, 31 municipalities were involved in the catch-up measures, and in 2020, 67. The municipalities concerned are home to 320,000 people. The sites selected under the programme are concentrated in the north-east and south-west of the country, where economic underdevelopment and skills shortages are combined with a concentration of social problems.

- **Village and farm manager network** – An operational, state-funded (normative subsidy) national network services, operating in municipalities in rural areas of less than 800 inhabitants (by 2022 it will operate in municipalities of less than 1000), currently employing 1500 public employees. This service is a form of primary social care. The training of the network's staff is currently the responsibility of the county municipalities; the possibility of linking the current training provided here with ASSIST training (synergy) should be explored in the future, as previously stated, some stakeholders need to see first what the training materials will be like.

- **Municipalities** – Although it is a question whether municipalities can participate in this kind of consultancy from the point of view of budget, decision-making and manpower (it depends on the possibilities and commitment of the given municipality), the majority of the actors interviewed **consider their involvement important.** At present, due to the centralisation and reallocation of resources by the state, many public administrations are under-resourced, overworked and understaffed. This situation has been made even more difficult by the COVID pandemic, which has led the State to take additional taxes, revenues and resources away from local authorities.

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- **Family support service** – The task of the services run by municipalities in the form of regional associations is, among other things, to provide social care (including counselling) to families and persons with social problems living in their area of operation. They are in direct contact with the target group; their workload, according to both field workers and municipal actors, is considerable. It is possible, but uncertain, whether they can be included in the system.

All the sectors interviewed confirmed the validity of the model. They see the development of such a scheme as very useful and beneficial, as it would help to support people living in energy and housing poverty in a number of ways. At present, there are actors that have been providing this type of sub-counselling for a longer or shorter period of time, but it cannot be considered as a coherent process or solution with a high impact.

The energy supplier EON involves the Maltese Charity Service in its own programmes in the areas where it operates, which is essentially - in a kind of intermediary role - constantly present in the affected areas. Prior to the upcoming planning periods, the charity is regularly consulted on what new points of contact and tasks it sees in connection with the target groups. The service provider also tries to involve local authorities in problem areas, with limited success. In general, local authorities are not involved in solving problems, but rather see it as a task for the service provider (e.g. theft of electricity, irregular connections, etc.). By its own admission, EON is also trying to address energy poverty from a social perspective - at system level.

Another important issue highlighted in several interviews is that energy poverty among people living in extreme poverty often **cannot be addressed separately from housing poverty or debt management.**

The following public and private actors have shown their interest and willingness to collaborate or to enter into further collaboration discussions for the implementation of this Scalability and Delivery model in Hungary. (see Annex 3)

Economic viability of the scalability plan

- On the one hand, the **human resources** needed to establish the network and prepare the training will amount to **60.000,00 EUR** for the two years plan, by incorporating a:
  - A national coordinator (coordinating organisation) to coordinate the activities of the HEA Network.
- On the other hand, other **implementation costs** will amount to **67.125,00 EUR** and will include:
  - Setting up an expert stakeholder group to facilitate professional decision-making on network tasks and activities. This includes professional support, experts support in the adaptation of the training material, setting of objectives, and definition of the different types of energy poverty and how to address them.
  - Setting up and launching the network in Hungary. This includes the adaptation of the training material in Hungarian language, adapted to the Hungarian context and the recruitment of consultants.
- As a result, the total estimated necessary **financial resources** amount to **127.125,00 EUR** and are summarized in the following table:

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Table 2:
Total estimated costs for the implementation of the Scalability and Delivery model in Hungary

Concept	Amount
Human resources (management, network support, HEA supervision)	60.000,00 EUR
Technical implementation and IT support for the learning platform	3.00,00 EUR
Update of training course for online learning, adaptation and translation of the training course and it's materials in Hungarian	7.000,00 EUR
Expert stakeholder group and network activities (management tools, webinars and meetings, site visits and networking tools, virtual office)	50.125,00 EUR
Communication campaigns, communication materials, online tools	7.000,00 EUR
TOTAL COSTS	**127.125,00 EUR**

In order to finance the implementation of this scalability model, it will be intended to make use of some of the possible options detailed in the *"Sustainability of the model"* point. It is worth noting that currently in Hungary, national funding is very limited, therefore, international funding is definitely needed to set up the advisory system.

Steps to reach the financing and set up the model

- In order to guarantee the necessary financial resources for the proper implementation of the scalability and delivery model, the following step will be followed:
- Keep in constant update to the interested stakeholders to reach their commitment with the project.
- Identify and contact new potential stakeholders.
- Set meetings and focus group sessions, if necessary, with the interested stakeholder for discussing more concrete contractual and collaboration issues, presenting new information such as the training materials.
- Negotiate and reach collaboration agreements, setting requirements, justification material and defining responsibilities.
- Have a common meeting with the committed stakeholders (public and private) for defining rules and obligations in order to avoid any misunderstandings.

The Gantt chart on page 25 plans the different tasks to ensure the financing of the initiative.

Sustainability of the model

The municipal sector is underfunded and centralised. While central cuts are significant, the range of tasks outsourced to municipalities is growing. This means that municipalities now must prioritise how much extra spending they take on and for what purpose.

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The civil sector is mainly dependent on grant funding, and the level of financial support from the general public (e.g. membership) is negligible (not measurable). Central, national funding for grants has been decreasing for years and the amounts available for such purposes have been diminishing year by year.

Based on the information received during the interviews, the following options are currently envisaged for the sustainability of the model.

1. **Energy efficiency obligation scheme (mechanisms requiring energy efficiency measures)** – In order to meet the energy reduction targets set in the National Energy Strategy and EU legislation, the government has introduced a new regulatory instrument: the Energy efficiency obligation scheme, which came into force at the beginning of 2021, requires energy suppliers (electricity, natural gas and transport fuel traders and/or universal service providers selling to end-users) to save energy in proportion to the energy they sell to end-users. Energy savings can be achieved through verified energy efficiency measures and investments. During the interview with the Ministry, it was suggested that the interest of the service provider side in the scheme could provide a basis for the involvement of energy companies in the ASSIST financing structure.
2. **Normative support** – As the civil and municipal sectors do not provide potential financial backing for such a scheme, the possibility of (partial) public funding is a line worth further discussion. This could be based on EU and national commitments, strategies and the new planning period.
3. **Project support** – In the new funding cycle, it will be necessary to monitor the opportunities for calls for proposals to part-finance and support the operation of the network.
4. **Energy providers** – EON has been working with the Hungarian Charity Service of the Order of Malta for many years. The company involves the charity in pre-defined programmes under a grant contract, including direct field counselling to people in need. The involvement of service providers in the model will be explored in more detail in the future.

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Dissemination Strategy

Climate Alliance Hungary (CAH) has an extensive dissemination base and network of contacts. Therefore CAH member organizations and member municipalities (local authorities), will be involved in communication activities, having a national reach. Moreover, green NGOs and networks will be mobilised, thanks to a long history of cooperation in Hungary for more than 30 years.

Additionally, during the interviews, several stakeholders expressed their interest in the possibility of getting involved; therefore, it is intended to count with the communication channels of all involved stakeholders, in order to gain visibility in a cross-sectorial manner.

The main communication **channels** will be:

- A well-established communication platform from CAH, the "KlímavéddVelem" Facebook page *(https://www.facebook.com/KlimaveddVelem),* which currently has more than 69,000 followers.
- Other CAH and involved stakeholders' social media channels.
- Regional media, with which CAH has a good relation.
- The **Climate Alliance Hungary website and the ASSIST website** as well **Social Media accounts** (twitter) will be used to spread the word and inform the participants.

These existing channels already count with a significant number of followers and the ASSIST name is already known in the sector at EU level. Climate Alliance will support by spreading the news on the EU level in case of relevant activities.

Communication and Branding

The main communication vision will be that through the HEA network, CAH and its partners contribute to alleviating energy vulnerability in Hungary. Supporting message will be that participating municipalities directly support their citizens in living more sustainable and healthier homes, using less energy, and reduce their energy costs and thus invest in the future of their children.

In this line, the **target groups** for direct communication will be:

- Municipalities.
- Environmental and social service NGOs.
- Vulnerable citizens of the municipalities where the HEA network will be active.

In order to directly reach the contacts and experts present in the administrative and institutional structure, the already established cooperation with the Ministry of Innovation and Technology, the Győr-Moson-Sopron County Municipality, the Association of Climate Friendly Settlements and Energiaklub, will be used.

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Planning and Monitoring

Specific objectives

As already stated, each local scalability plan will count with specific objectives and indicators to be accomplished along the implementation of the plan for the next 2 years, starting in 2022. This Scalability plan aims to:

1. Scale at **national level** – even though the initial intention is to start small (regional), the collaboration with national partners is foreseen, therefore resulting in a plan with a "national" coverage.
2. **Train 50** advisors, approximately 2 to 3 per county (Hungary has 19 counties), these advisors will be social operators either social actors from NGOs and charities or public social workers, the idea is to have representatives from different organizations and sectors as a way of having a wider coverage of the model in terms of vulnerable people.
3. **Support between 10 and 15 vulnerable people per advisor,** which means between 500 and 750 people.
4. **Count with the support of local, regional, and national entities** mainly existing NGOs and charities that are already working on the field. The ideal objective will be to get to involve some municipalities (as stated before, right now it is not the best moment).
5. **Find the necessary financial resources** for the proper implementation of the scalability plan. The project aims to count with a public-private collaboration in terms of both financial and non-financial resources. As stated above, for finding the necessary financial resources, more meetings and further negotiations will be held with key stakeholders, to find a perfect balance collaboration point, which will guarantee the necessary financial resources for the implementation of the plan. In Hungary's current situation national funding is very limited, therefore, international funding is definitely needed.
6. **Secure the sustainability of the project in the long run** mainly by securing the financial resources. This objective goes in line with the fifth objective; therefore, similar actions will be done such as constant stakeholders mapping and negotiation with the most interested ones in order to set collaboration agreements. Moreover, always high-quality training material and assessment will be done and satisfaction questionnaires will be fulfilled by the end-users in order to show the real importance and impact the project generates.
7. **Adopting the Covenant of Mayors' Energy Poverty Indicators.**

Besides, the ongoing project POWERPOOR (2020-2023) from ENERGIAKLUB's shows synergies with the ASSIST system, which could facilitate the dissemination of the model in Hungary. The first advice office was opened in Nagykanizsa, therefore, one of the objectives of the implementation of the ASSIST model in Hungary, will be to actually seek for these synergies, taking advantage of existing initiatives that allow a smoother implementation.

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Indicators and evaluation mechanisms/strategies

The following indicators and evaluation mechanisms will be followed in order to (1) guarantee the correct implementation of the proposed plan, together with the accomplishment of the expected objectives, and (2) for influencing both the policy makers and the people accessing the services in order to catalyse change and action.

Table 3:
Indicators and evaluation mechanisms

Expected Objectives	
Geographical coverage	National
Number of trained advisors	50 advisors
Attended users	500 – 750 people
Number of stakeholders involved (private and public)	6
Municipalities commitment level (none – promised to have a look - just dissemination – implementation – policy adaptation)	Policy adaptation
Private sector commitment level (none – promised to have a look – just dissemination – non-financial – financial)	Financial and non-financial

Environmental and social factors	
Reduction in energy consumption (kWh)	Not applicable
Reduction in CO_2 emissions (CO_2 tons)	Not applicable
Comfort level improvement	Not applicable
Increase operator's empowerment	High
Increase users' empowerment (i.e., decreased vulnerability to the energy market) (qualitative)	High
Public acceptance of the model (qualitative)	High
Social operators' satisfaction (qualitative)	High
Training material usefulness (qualitative)	High

Indicators will be checked in a constant manner in order to identify possible deviations and apply the necessary corrections with time and in an effective way. It is worth noting that some of the indicators, the social ones, will be measured through the elaboration of questionnaires that will be fulfilled by the end-users after the energy assessment and also by the social operators who receive the training and do the identification and assessment services.

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Gantt chart

The scalability plan of the ASSIST model is conceived as a **2-year plan.** The following Gantt chart shows the project planning, including milestones and all necessary activities for reaching them in a timely manner.

Table 4:
Gantt for the Scalability Plan in Hungary

Gantt for the Scalability Plan of Hungary

ID	Activity	YEAR 0	YEAR 1												YEAR 2												YEAR 3
		MONTH 0	MONTH 1	MONTH 2	MONTH 3	MONTH 4	MONTH 5	MONTH 6	MONTH 7	MONTH 8	MONTH 9	MONTH 10	MONTH 11	MONTH 12	MONTH 13	MONTH 14	MONTH 15	MONTH 16	MONTH 17	MONTH 18	MONTH 19	MONTH 20	MONTH 21	MONTH 22	MONTH 23	MONTH 24	MONTH 25+
1.	**Stakeholders Engagement**																										
1.1	Mapping of new key actors (public and private)																										
1.2	Preparation of a brief project's presentation document																										
1.3	Negotiation with potential stakeholders																										
1.4	Elaboration of written collaboration agreements																										
2.	**Ensuring the conditions of implementation**																										
2.1	Definition and allocation of tasks																										
2.2	Identification of resources																										
2.3	Setting of objectives																										
2.4	Definition of the different types of energy poverty and how to address them																										
3.	**Creation of the stakeholder group**																										
3.1	Negotiation with key stakeholders																										
3.2	Negotiation with new potential stakeholders																										
4.	**Adaptation of training materials**																										
4.1	Receive ASSIST Training Materials																										
4.2	Review of training from local perspective																										
4.3	Adaptation and translation of training to local circumstances																										
4.4	Creation and feed into local materials to online platform																										

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Gantt for the Scalability Plan of Hungary

ID	Activity	YEAR 0	YEAR 1												YEAR 2												YEAR 3
		MONTH 0	MONTH 1	MONTH 2	MONTH 3	MONTH 4	MONTH 5	MONTH 6	MONTH 7	MONTH 8	MONTH 9	MONTH 10	MONTH 11	MONTH 12	MONTH 13	MONTH 14	MONTH 15	MONTH 16	MONTH 17	MONTH 18	MONTH 19	MONTH 20	MONTH 21	MONTH 22	MONTH 23	MONTH 24	MONTH 25+
5.	**Recruitment of consultants**																										
6.	**Training energy consultants**																										
7.	**Communication and Dissemination**																										
8.	**Monitoring and Evaluation**																										
9.	**Sustainability of the model**																										
9.1	Presentation of the project results																										
9.2	Search for new potential collaborators																										
9.3	Negotiation with potential stakeholders																										
9.4	Elaboration of written collaboration agreements																										
9.5	Updating and optimizing the training material																										
10.	**Replication of the model in new regions**																										
10.1	Stakeholders Mapping																										
10.2	Contacting new potential stakeholders for replicating the model																										

Milestones

The Hungarian Scalability and Delivery model has established the following milestones:

1. Ensuring the conditions of implementation, adoption of the Covenant of Mayors' Energy Poverty Indicators.
2. Creation of the stakeholders group
3. Adaptation of training material
4. Selection and training of consultants
5. Monitoring & evaluation

Controlling strategies

It is intended to keep a constant control of the overall project along its lifespan, in order to foresee any possible deviations and correct them in a timely manner, following the continuous improvement principles. Therefore, the following controlling strategies will be followed:

- **Managerial follow-up:** monthly meetings will be held with the project stakeholders for general financial and managerial issues. Independently, internal meetings will be held with the social operators, in case things are unclear or suggestions arise.

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- **Indicators check:** some millstones will be set at the beginning of the project regarding the expected achievement of the project indicators, so every 6 months; indicators will be checked to see how the implementation is going. The idea is to follow the Earned Value methodology.
- **Reporting activities:** every 6 months a project status report will be done, concerning all different aspects of the project.
- **Reviewing the identified risks:** every time a new risk is identified the risks table will be updated. On Managerial monthly meetings, participants will be asked if they have identified any risk or foreseeable risk. Risks will be monitored and controlled along the project's lifespan, especially the high severity risks.
- **Apply preventive and corrective measures:** in case any risk is materialized the corresponding corrective or preventive strategy defined will be implemented.

Risk Management

The table below summarizes the identified risks, and details a response strategy for each of them. From the 7 identified risks, 3 of them are considered of high severity, 3 of medium severity and 1 of low severity, this categorization will determine the prioritization of the risk both in terms of controlling and monitoring and in response.

Table 5: Risk analysis and management

Risk Qualitative Analysis							Response Plan			
ID	Risk	Probability	Factor	Impact Factor	Severity		Name of the response	Description of the response	Strategy	Action
01	Limited involvement of local governments	70%	3	2	6	High	Defined stronger approaching strategies, involvement of municipalities in the network, joint lobbying at national authorities for a coherent energy poverty strategy	Have more effective strategies to approach the municipalities that have shown interest in supporting the network financially and at decision-making level	Mitigate	Preventive
02	Difficulties on getting resources from the municipalities (now underfinanced due to centralization and the Covid19 situation)	70%	3	2	6	High	Be aware of the current situation	Municipalities are expected to recover their own revenue sources in the post-COVID recovery period. Be aware of when this happens to act.	Accept	Corrective
							Raise awareness of new support programs	Raise awareness among decision-makers of the shortcomings of energy efficiency support programmes	Accept	Corrective

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Risk Qualitative Analysis							Response Plan			
ID	Risk	Probability	Factor	Impact Factor	Severity		Name of the response	Description of the response	Strategy	Action
03	Lack of commitment of the private sector	80%	3	2	6	High	Liaise with private sector representatives	Present ready-made training programme and set-up network when asking for funds	Mitigate	Preventive
04	Lack of public awareness and knowledge on energy poverty	50%	2	2	4	Medium	Strong communication, joint lobbying at national authorities for a coherent energy poverty strategy	Develop strong communication materials to raise awareness regarding Energy Poverty	Accept	Corrective
05	Turnover in the civil sector due to low salaries	40%	2	2	4	Medium	Lobby for possible funding	Develop employee success recognition system	Accept	Corrective
06	Lack of commitment of the civil sector due to political fragmentation	30%	2	2	4	Medium	Strong communication, joint initiatives in energy poverty to establish mutual interest	Involve all interested parties in setting up the training programme and network when asking for funds	Mitigate	Preventive
07	Negative perception of a new initiative on a field with almost no funds available - CAH can be perceived as competitor	15%	1	1	1	Low	Strong communication, joint initiatives in energy poverty to establish mutual interest	Setting up an inclusive profile network with open structure, strong communication	Mitigate	Preventive

Impact – Probability matrix

Through the use of the impact- probability matrix, it will be possible to identify the existing priority risks throughout the project through Severity, which is calculated by multiplying the corresponding probability and impacts defined for each identified risk. This matrix allows having a more visual image of the identified risks, making it easier to have a special focus on the high severity risks.

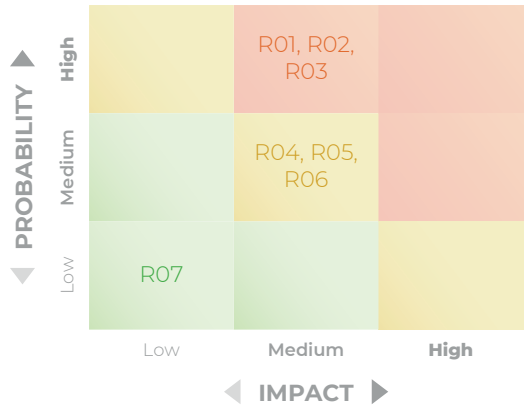

Figure 2:
Impact – Probability matrix

SUITE

SCALING UP INNOVATION TOGETHER
FOR ENERGY VULNERABILITY

PLAN WITH A NATIONAL COVERAGE

ITALY

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NATIONAL **COVERAGE PLAN**

ITALY

ASSIST Scalability Plan & Delivery model

Analysis of the Local context PAGE 31

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Analysis of the Local context

In Italy there is no official definition of energy poverty. Energy poverty was mentioned in official documents in the National Energy Strategy[1] in 2017. Since then, in line the European directives, several formal documents and reports have been published in Italy including energy poverty. The most recent is the second report on energy poverty (2020) published by the academic observatory OIPE (Osservatorio Italiano Povertà Energetica[2]). The report illustrates the situation of energy poverty in Italy in 2020 and shows that 8.8% of the Italian population suffers from energy poverty and that the number has shown an increasing trend by 0.1% every year since 2016 (equivalent to 40 thousand families every year). The report also shows that the percentage is higher in the South of Italy where the percentage varies between 13 to 22%.

OIPE has calculated these data according to an objective-relative measurement, based on the English low income-high cost (LIHC) approach with two substantial differences: actual expenditure data is used (national statistical source - Istat) and families in a condition of deprivation and with zero heating costs are included. According to this measure, a family is in energy poverty if:

1. Its equivalent energy expenditure is more than double the average expenditure and, together, its total expenditure, net of energy expenditure, is below the relative poverty line, as identified by Istat.
2. A household with equivalent total expenditure below the median also has zero heating expenditure.

Existing regulations

In Italy, following the indications of the European Commission, energy poverty has been included in the National Energy Strategy (SEN) in 2017 and then in the Integrated Energy and Climate National Plan (PNIEC[3]) in 2020. These documents describe the problem in the national context and provide a definition of people suffering from energy poverty as those not able to buy the minimum amount of needed energy.

How Energy Poverty is currently being tackled in Italy

In Italy there is no specific energy poverty mitigation strategy or mechanism.

Energy poverty is tackled in Italy through a **fiscal tool** addressing low income households; the energy fiscal bonus (both for electricity and gas) provides financial help (approximately 100 euro per year)

1 https://www.mise.gov.it/images/stories/documenti/Testo-integrale-SEN-2017.pdf

2 http://oipeosservatorio.it/

3 https://www.mise.gov.it/images/stories/documenti/PNIEC_finale_17012020.pdf

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to people with a low income. The bonus will now be provided in an automatic manner and there will be no more to fill the request.

Further to the above-mentioned financial help, there are several actors providing financial or non-financial support to people facing energy poverty. **Financial support** is provided by charity organisations such as CARITAS who pays the energy bills of people in need. **Non-financial support** is provided mainly by consumer associations which, through their local helpdesks, provide support and advice to consumers.

Not specifically addressing energy poverty, but on a wider social basis there is some financial support addressing vulnerable, poor or low-income citizens. These financial tools are managed by the Ministry of Social policies at National level or by social departments at municipality level.

Innovation scalability proposal

The ASSIST model based on the training - networking - action of operators already active on the ground (so as to avoid identification and trust issues) with a holistic approach (so as to consider the multidisciplinary nature of energy poverty) would be highly innovative in the Italian context. As mentioned above, energy poverty has been recently included in the energy policy frame, however there is no mechanism to provide support to people in energy poor conditions - be it financial or non-financial support. People facing energy poverty in Italy have no ways / channels to seek advice or support.

The implementation of the ASSIST model - empowering operators already active on the ground - will enable to fill in a societal gap related to energy poverty. The ASSIST model would build on the already existing context (social and technical) by integrating and empowering competencies and services offered. The implementation of the ASSIST model would provide a mechanism for citizens to seek advice and support when facing energy poverty related issues and would create a link between the different operators (through the network) and facilitate the transfer of best practices.

Private sector potential

Similar to the situation in other European countries, energy poverty needs to be addressed from a systematic and structural perspective, involving different sectors towards a common goal. Nowadays one of the key identified challenges is funding and the collaboration between the public and the private sector is considered to be essential.

The private sector would get the following benefits by getting involved in the scalability plan of the ASSIST model:

1. Increase their visibility and improve their reputation. It would give them some assets and knowledge to explain to their stakeholders and their consumers/clients.
2. Economic incentives opening the possibility to new contracts (commercial action)
3. Corporate Social Responsibility (CSR) mechanisms. On one hand, bigger companies are involved in some kind of social activities and, on the other hand, small and medium companies may have some interest in social impact.

However, the work done on the interviews and organization of focus groups has shown that reaching private companies is not an easy task. In general private companies are always more reluctant to finance external initiatives (even if with a social objective) and more specifically they have not been involved in initiatives addressing energy poverty as the topic is still not widely known and remains a niche sector and is not a first goal for any private company. Furthermore after the economic crisis (post Covid19), the financial

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Delivery Model

availability of big companies is not favourable (even though big companies such as energy companies have not really been affected by the crisis)

The Italian proposed model to scale the ASSIST model envisages the support of the private sector, either developing a public-private collaboration (similar to the existing initiative named RAPPEL network in France) or building two separate models (one for the public sector addressing municipalities and being self-funded by them, and one addressing operators on the ground financed by the private actors – see description below). The latter option (i.e. two separate implementation models) is the one pursued within the SUITE project which has led to the **two-fold scalability model:**

1. **Rete ASSIST-TED** (HEAs Network, where TED is the Italian acronym for HEA) – being a non-profit association managing the network of the HEAs in Italy.
2. **ASSIST-PA** (ASSIST model for Public Administrations) - being a non-profit association of municipalities to share and work together on the problem of energy poverty implementing the ASSIST model.

The support of the private sector, both in terms of financial and non-financial resources, will imply the possibility of increasing the project impact, both in quantitative terms - operators trained, and in qualitative terms - available offered services.

This Scalability and Delivery model will be focused in Italy, having a national coverage, consisting on the scalability of the already developed National Network of HEAs by the ASSIST project and this scalability is conceived as a two-legged system designed to work either independently or in synergy.

ASSIST model for Public Administrations such as municipalities (ASSIST-PA)

The first leg of the proposed model addresses municipalities and aims to support them in increasing knowledge and capacity in drafting and implementing effective measures addressing the energy poverty problem within their Sustainable Energy and Climate Action Plan (SECAPs). Moreover, the involvement of public institutions and research bodies (such as Enea) will be strategic to achieve the integration of the ASSIST model in the SECAPs.

The model aims at **creating a virtual hub of municipalities** (an association) which will offer to the adhering municipalities the training (100% online) and the working resources and technical support for the design and the implementation of the energy poverty actions within the SECAPs. The hub will consist in the creation of a website with open information and resources and a reserved are (accessible only to the members) to gather the participants, share news and information (the website, is in its preliminary design phase at the moment and will follow the structure of the future Energy Poverty Advisory Hub – EPAH [4]).

4 www.energypoverty.eu

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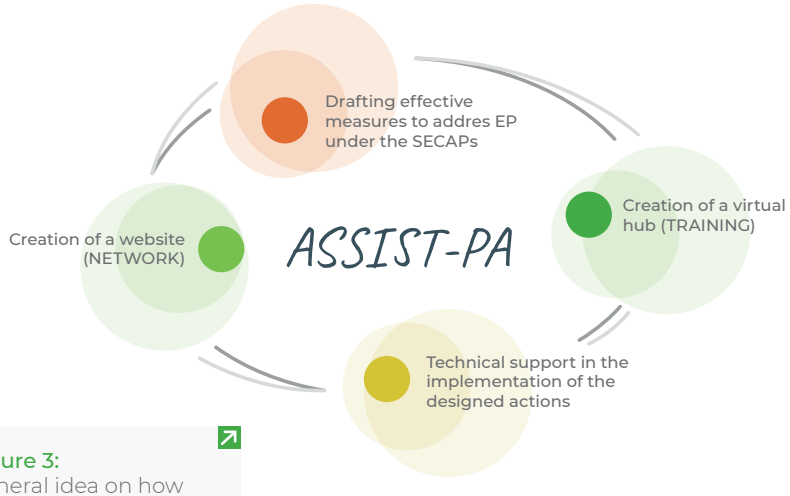

Figure 3:
General idea on how the ASSIST-PA will work.

The delivery model has been defined within a series of focus groups organised specifically for municipalities. These focus groups have been organised with 2 Italian associations of cities (Climate Alliance Italy and Coordinamento Agenda21). Within the focus group participants have shared the need to do something to address the problem of energy poverty and also the need to have best practices. The details of the mechanism and the participation fee have also been discussed.

The financial mechanism of the **ASSIST-PA hub** would be an "energy poverty association of municipalities", based on a participation fee to be paid by the municipalities adhering to the hub.

ASSIST – Household Energy Advisor (HEA) Network (RETE ASSIST-TED)

The second pillar consists of the creation of a wide **network unifying all actors** and operators (the HEAs, called TED in Italian, Tutor per l'Energia Domestica) interested and involved in projects on energy poverty. The network would be open and freely accessible to all interested actors and will provide to its members useful information and training material as well as organise working groups, exchange opportunities and networking events. Moreover, the network would help gather funds to carry on initiatives aiming at tackling the problem of Energy Poverty. The stakeholders, the HEAs, and other interested actors will be able to keep track of the activities, initiatives, and any other action taking place also through a website (following as an example the Rescoop website https://www.rescoop.eu/)

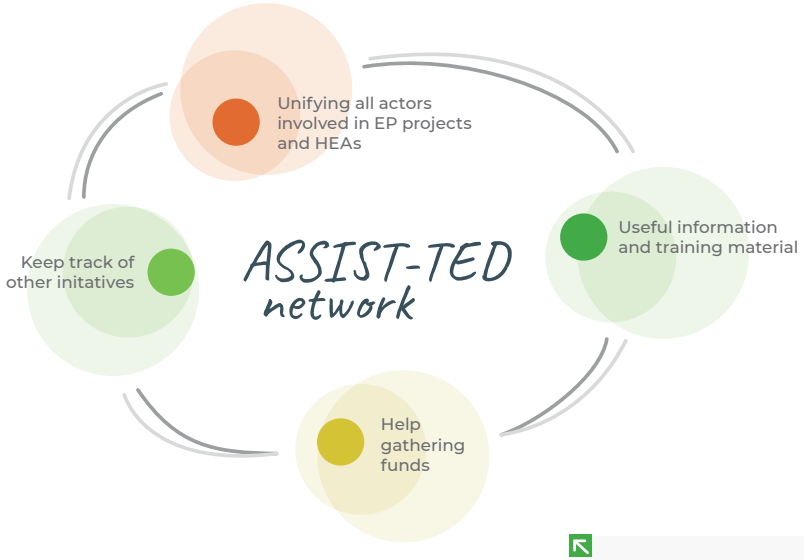

Figure 4:
General idea on how the RETE ASSIST-TED will work

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The delivery model of the ASSIST-TED network would be mainly through **private sponsorship** interested to financially support the work of the association within their CSR policies. Further collaboration with other actors to carry out part of the work of the ASSIST-TED network is also being sought.

Several focus groups have and are being organised to build the scalability plan of the RETE ASSIST-TED model in Italy. Thanks to the input collected within these focus groups and the initial interviews, the final definition of the roles and responsibilities will be assessed after understanding who will be the actors committed in the project.

At the moment, prior the official launch of the RETE ASSIST-TED (following the definition of the financial agreements with private actors and other sponsors) AISFOR will be responsible of updating the training material and uploading it on the Moodle platform so as to open the ASSIST-TED course as soon as possible and set the ground for the enlargement of the network. The revision of the course will be carried out with the support of the previous Italian ASSIST partner (RSE and AU) and of potential future members of the association (such as Banco dell'Energia). AISFOR is in fact already collaborating with Banco dell'Energia for the building and implementation of a local project to support 100 families to pay their energy bills. Within this project, volunteers of the church involved in the project will undertake the ASSIST-TED training (therefore the ASSIST-TED training needs to be updated prior to the project launching).

Once the association is formally launched AISFOR will remain responsible for the preparation and updating of the training materials as well as other resources, together with the running of the platform and the general management of the network. Potential future members have expressed their interest / availability to analyse data collected so as to assess impact, or to promote the training course and to network with other social actors.

Objectives and functions

The Italian Scalability and Delivery model will be a **two-legged model** designed to work in synergy but with specific objectives, targets and activities:

1. **ASSIST-PA:** a non-profit hub (association) of municipalities with a public financial mechanism. It is intended to have national coverage, trying to insert the ASSIST model within the SECAPs as a ready-to-use model, to facilitate its implementation.
2. **RETE ASSIST-TED:** a non-profit association of operators with a public-private financial sustainability plan. It is intended to provide the training resources and working tools to all operators interested in deepening the problem and working on a ground level to provide support.

In both cases, the delivery plan will foresee the taking-up of the entire ASSIST model, i.e. training - networking - action of operators with empowered competencies and knowledge on energy poverty able to provide support and advice in situations of vulnerability and/or energy poverty.

Additionally, both models will have a dedicated area on Moodle (an online training platform already adapted within the ASSIST project. The Moodle will allow for future HEAs (be them civil servants for the ASSIST-PA model or operators on the ground for the RETE ASSIST-TED model) to undertake the online training, to access to prepared working resources, to access to news and events on energy poverty and will be an environment to network amongst the HEAs. As for the updating of the training resources of the ASSIST course, AISFOR is already working on building and structuring the Moodle area. In line with AISFOR training growth strategy, a unique Moodle area has been created (www.aisforacademy.eu) which will contain two separate and distinct areas, one for each of the implementation models accessible ONLY to the relative HEAs (this structure will

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enable to build specific resources according to the different target of the implementation models).

Procedure and offered services

In both the Italian delivery plans of the ASSIST model the first step is represented by the **setting up of a non-profit association.** This further step is needed as AISFOR is formally a for-profit organisation and even if it works with a non-profit logic (with no distribution of revenues) it may not have access to many social opportunities (such as calls of foundations). The focus groups carried out within SUITE have aimed to define the best ways to start the association.

For each of the Italian plans, the activities to be implemented are reported below:

ASSIST-PA - Creation of a hub (association) for municipalities with the specific scope to join forces on energy poverty. The association would combine and reunite municipalities and guide them in the implementation of energy poverty activities (to be included within their SECAPs). The creation of an association will require the identification of the 3 members of the Assembly and a significant number of municipalities adhering to the hub. The hub would provide the following **services:**

- **Training resources** open and accessible to all municipality members' staff through the specific Moodle area. The training resources initially will include the "basic" ASSIST course, during the lifetime of the hub (starting from the beginning) new training resources will be built to respond to the training needs identified amongst the hub members and shared during the networking events (possible future topics for the training may be financial schemes, European policies, One Stop Shop, etc.)
- **Working resources** (templates, guidelines) open and accessible to all municipality members' staff.
- **Networking events** to discuss and share experiences by municipalities on energy poverty.
- **Best practices and a map of identified initiatives** carried out by municipalities to tackle energy poverty (both at National and at European level, in synergy with the European Energy Poverty Observatory).
- A unique repository of **energy consumption and social data collected** by the municipality staff trained as HEAs.
- **Workshops** and other events on the theme with National and European experts - linking also with national and European projects / initiatives.
- **Political lobby** to push energy poverty on the national and European political agenda.

In order to build the hub and delivery the above-mentioned services, the following **steps** will be implemented:

1. Creating the ASSIST-PA hub - formally create the association (or include the hub in existing associations) of municipalities interested in energy poverty (definition and signature of agreements)
2. Structuring the Moodle area and updating the training and working resources.
3. Building and publishing a website to act as the main communication means to inform on the existence of the hub and invite new members to register. The website will be connected to social accounts on Twitter and Instagram.

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4. LAUNCH the ASSIST-PA hub.
5. Building and growing of the hub - further to the municipalities engaged in the focus groups, the newly formed hub will be disseminated through the mailing list of existing networks to Italian municipalities inviting them to join the hub. It is expected that the hub will include a minimum of 15 municipalities at the start and after the first year will count on 50 municipalities.
6. Continuous updating of the ASSIST training course, the resources prepared within the ASSIST project will be updated and adapted to the target of municipality staff and will be made available through the Moodle area of the ASSIST-PA hub. It is expected that at least 1 person per municipality member (i.e. 50 people will undertake the ASSIST training course) by the end of the first year. Within this action, the municipality will be responsible for defining how energy poor citizens will be identified and addressed and engaged and what services will be offered to them.
7. Updating and integrating ASSIST working resources so as to provide the members with useful and practical documentation on how to implement actions addressing energy poverty.
8. Supporting municipalities in the design / implementation of energy poverty actions: Each municipality will decide what actions to implement to tackle energy poverty and the hub will provide support to the municipality in designing / implementing / monitoring the action. It is expected that at least 10 municipalities will have designed an energy poverty action by the end of the first year.
9. In the first year, the organisation of at least 1 event (networking or workshop) only for the hub members with a participation of at least 10 municipalities (1 or 2 people per municipality).
10. In the first year, the organisation of at least 1 external event on the fight against energy poverty and the role of municipalities to promote the hub and to invite new members to adhere with the participation of at least 50 people representing at least 30 municipalities.
11. At the end of the first year, the publication of a report on the initiatives by Italian (and non-Italian) municipalities to tackle energy poverty (links and synergies with the EPAH publications will be created).
12. At the end of the first year, an assessment of the goodness of the services offered by the hub will be carried out to decide if and how to integrate (modify the services to be more compliant to the needs of the municipalities). A possible new service to be launched during the second year may be the building of a unique database for the collection of energy consumption data so as to provide all municipalities with a unique and common database which can be accessed and integrated by all civil servants (HEAs).

Rete ASSIST-TED (Household Energy Advisor Network) - Creation of a non-profit association open for all on the ground operators interested in energy poverty. The association will be free and open to all operators (independently from their working context and background) interested in energy poverty with a bottom-up and holistic approach. The concept of the association is that the wider the context and background of the members the better as the multidimensionality of energy poverty can be taken into account. The association will be composed of stakeholders divided into members; the creation of an association will require the identification of the 3 members of the Assembly. Further stakeholders will be invited to act as sponsors, co-funding the activities of the association. The association would provide the following **services:**

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- **Training resources** open and accessible to all members. The training resources can start off with the "basic" ASSIST course and new resources can be built progressively on other topics (such as financial schemes, social support measures, political frame for energy poverty, etc.)
- **Working resources** (templates, guidelines) open and accessible to all members.
- **Networking events** to discuss and share experiences of members on energy poverty.
- **Workshops** and other events on the theme with national and European experts - linking also with national and European projects / initiatives.

In order to build the association and delivery the above-mentioned services, the following **steps** will be implemented (the updating of the training course and the Moodle area have been already done within the SUITE project):

1. Identifying the financial sponsors of the association and quantifying the available budget (a possible financial plan is being discussed with some stakeholders).
2. Creating the RETE ASSIST-TED association - drafting and formalising the statute of the association, assigning roles and responsibilities and democratic mechanism, etc. The pre-feasibility study for this step has already been carried out.
3. Building and publishing a website to act as the main communication means (the quotation for the website has already been asked for and also the structure of the website has been prepared in the mock version). The website will have a structure to provide information on energy poverty and more specifically on the network and will be the access point to the network itself, by which network operators will request access to adhere to the association. The website will be connected to social accounts on Twitter and Instagram.
4. LAUNCH the RETE ASSIST-TED Association - September 2021. A paper has been submitted and accepted within the Sustainable Places[5] event which will be held in Italy at the end of September for the launch of the Italian RETE ASSIST-TED network.
5. Building and growing the association - the association of HEAs would initially include all the HEAs from the ASSIST project and the ones which will be formed in the coming months (within SUITE training courses are being revised and 10 HEAs will be trained in the coming months. The target is to train 70 HEAs by the end of the first year of the association). As mentioned above, the training of new HEAs will start prior to the launch of the ASSIST-TED network thanks to the collaboration on a project of Banco dell'Energia.
6. Further to the update of the ASSIST training course (carried out within SUITE), further training resources will be prepared on different energy poverty related topics (such as financial mechanisms for renovations to increase the energy efficiency, social financial support, impact on health, etc.).
7. The update and integration of the ASSIST working resources will be carried out so as to provide the HEAs with useful and practical documentation on how to implement actions addressing energy poverty.
8. A unique monitoring and data collection mechanism will be developed to be used by all HEAs to build a database (in an anonymous manner and compliant with the GDPR) of energy

5 https://www.sustainableplaces.eu/

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consumption data combined with social data and households' characteristics data.

9. In the first year, the organisation of at least 3 events (networking or workshop) only for the HEAs with a participation of at least 10 HEAs.
10. In the first year, the organisation of at least 1 external event on the fight against energy poverty to either launch (at the beginning) or illustrate the progress (at the end of the first year).
11. A working group on a specific topic related to energy poverty will also be created where HEAs can participate on a voluntary basis.
12. At the end of the first year, the publication of a report on the initiatives by Italian (and non-Italian) actors to tackle energy poverty (links and synergies with the EPAH publications will be created).

Training and accompaniment

As for the training, it will be **100% online** and will be built from the existing tools, resources and materials from the ASSIST project. This training will be addressed to social all operators (respectively civil servants and on the ground operators for the two implementation models) through an online platform as part of the ASSIST-PA leg and as part of the ASSIST-TED network. As mentioned above the training course will be set-up on specific areas of the AISFOR Moodle area already online (within www.aisforacademy.eu)

The two training courses - even if both related to energy poverty - will be built in order to address the different target groups (on one side civil servants and municipality staff and on the other on the ground operators). The standard training will be of about 20 hours and will be complemented with other training resources to illustrate in depth specific aspects of the energy poverty problem.

In both models (ASSIST-PA and ASSIST-TED) additionally resources will be prepared to support the implementation of the actions (such as guidelines, templates, best practices, etc.), and events will be organised to discuss and share experiences on the design and implementation of the ground actions.

Both the training and the working resources will be accessible online through the platform (each model will have its specific platform).

SWOT matrix

The following SWOT matrix is drawn taking into consideration the local context of Italy, the expertise and lessons learnt from the implementation of ASSIST and all the input provided by the different actors participating in the focus group and interviews. It consists in the identification of Strengths, Weaknesses, Opportunities and Threats that will be included in the further overall analysis to help to determine different strategies to follow in the decision-making process.

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Strengths

- Possibility to use the ASSIST network and knowledge to scale up the project.
- The knowledge and tools AISFOR already has in the training field.
- Growing cultural interest in sustainability and social issues related to energy transition (and subsequent political attention).
- Existence of similar successful models in other European countries.

Opportunities

- Possibility to develop and spread the concept of Energy Poverty as a 360° social problem requiring an integrated action with the other social operators.
- Lack of an already established network to support energy vulnerable people in Italy, ASSIST model can be the first to "enter the market".
- Growing cultural interest in sustainability and social issues related to energy transition (and subsequent political attention).
- The development of a pillar of the project untied to public bodies could preserve it from political changes of vision and priorities.
- The Covid19 pandemic has brought attention to the energy poverty problem (smart working, online schooling and the related increase of power needed in the houses).

Weaknesses

- Lack of clear understanding of Energy Poverty at a cultural level.
- Lack of financial stability if the project will be dependent on public/ private funds and donations.
- The for-profit nature of AISFOR could bring a negative perception from the other stakeholders.

Threats

- The partnerships with municipalities could undermine the development of the project in the long term due to political twists.
- The lack of a cultural knowledge of the Energy Poverty problem could bring to a reductive definition of the problem leaving aside its social impact.
- The reluctance of private entities to commit financially (in the medium/ long term).
- Negative perception of social operators and organizations (falsely perceived competition).

Potential Users

Both models (ASSIST-PA and RETE ASSIST-TED) aim to contribute to tackle energy poverty by empowering municipalities (and other public actors) and on the ground stakeholders / operators on the causes / impact of energy poverty in order to enable them to be effective in addressing the final target, which mainly consist of citizens living in energy poor conditions (including also citizens at risk of energy poverty) and citizens being energy vulnerable, being not aware of the energy market and not being in a position to have the benefits from the market. Through the project it is intended to reach between 750 and 2.000 people.

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Stakeholders Consultation

The aim of having a focus group session and interviews with different actors, representing different sectors that may have a role in the overall proposed model was to validate its viability. As already stated, the two models pursue a national coverage and are synergistic to each other - combining collaboration between the public and the private sector in order to guarantee its economic sustainability in the long run.

With this purpose, interviews were held in April and May, and several focus groups have been planned in the following weeks (between end of May and beginning of July). The strategy adopted in Italy was to organise more than 1 focus group in order to address individually the various targets related to the two models:

1. **ASSIST-PA:** in collaboration with Alleanza per il Clima (Climate Alliance Italy) and Coordinamento Agenda21, a series of focus groups meetings were organized to collect inputs from municipalities. The first one was held on the 27th of May, the second on the 17th of June and the last on 7th of July. These events have introduced the ASSIST-HEA model and the work done on the ASSIST project, collected inputs on the need to implement actions on energy poverty by municipalities and shared the work done and have discussed the proposed implementations models.

   The output of the focus groups with municipalities is that indeed there is the interest on the topic and that there is the need/interest to implement actions but there is a lack of knowledge and competencies to be able to do something on energy poverty. Municipalities have welcomed the idea of "using" the resources and outputs of the ASSIST model, especially the idea of having trained staff (HEAs figures). Therefore, in this line, the possible implementations plans are:

   A) Hiring as external staff HEAs combining the activity with the work of the social department (usually carried out through external tenders) - this model may lead to combining the two Italian models in a unique energy poverty network.

   B) Delivering the ASSIST services (training on energy poverty and support in the design and implementation of the actions) as to-pay for services according to the needs (and demands) of the municipalities.

   C) Introduction of the ASSIST model (in terms of services on energy poverty) within existing associations.

   D) Creation of an association specifically on energy poverty with an entry fee, in line with the model suggested.

   E) Enlargement of the scope of the ASSIST model to address the need of municipalities to implement One Stop Shops (OSS) as requested by the European Commission.

2. **RETE ASSIST-TED:** focus groups addressing only social actors will be held on the 5th of July and focus groups addressing private actors will be held in mid-July (the date still is to be confirmed). The idea of splitting the focus groups came from the interviews with some social actors who suggested having a preliminary meeting only amongst social peers to be able to speak more openly and freely. These two focus groups will allow presenting the work done on ASSIST and introduce the implementation plan of the Associations of HEAs (already shared individually during the interviews) and collect the

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interest of the social actors not only on being members of the association but more specifically on the role they could play.

As the table below shows, the Scalability and Delivery Plan was improved and validated by representatives of both the public and the private sector. Through the focus group sessions it was possible to contact different points of view from the economic, the public and the social perspective, allowing to shape a plan that not only foresees for its sustainability but it addresses in the best possible way the existing needs of vulnerable people in Italy.

Table 6:
List of participants to the Focus Group Sessions and interviews

Municipality series of Focus Group Participants (27/05 - 17/06 - 08/07)	Social Focus Group Participants (07/07)	Interviewed actors
1. Alleanza per il Clima	1. Amici della Terra (tbc)	1. ANCI-ER
2. Coordinamento Agenda21	2. ASHOKA	2. Acquirente Unico (AU)
3. AGENA (Agenzia Energetica Teramo)	3. Banca Etica (tbc)	3. Banco dell'Energia
4. Associazione Borghi Autentici	4. Banco dell'Energia	4. CARITAS
5. Ates, Agenzia Territoriale per l'Energia e la Sostenibilità di Parma	5. CARITAS	5. Coordinamento Agenda21
6. Sipro, Agenzia per lo Sviluppo della Provincia di Ferrara	6. Cittadinanzattiva	6. Comune di Roma
7. Comune di Martinsicuro	7. Croce Rossa Italiana (tbc)	7. Climate Alliance Italia
8. Comune di Pesaro	8. Federconsumatori (tbc)	8. ENEA (Italian National Agency for Energy and Environment)
9. Comune di Sissa Trecasali	9. Fondazione CARIPLO	9. ENI Gas & Luce
	10. Fondazione di Vittorio	10. GSE
	11. Fondazione SNAM	11. IRE - Agenzia Energetica Ligure
	12. Legambiente	12. RiEnergia
	13. Unione Nazionale Consumatori	13. Ricerca per il Sistema Energetica (GSE)

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According with the **two pillar-based model** two types of involvement are envisaged:

- On one hand, private companies and foundations will be involved in the funding of the ASSIST-TED network, the practical implementation of the training courses and the subsequent network operations. Social operators and other interested actors will become active participants in the network.
- On the other hand, municipalities and eventually Public Institutions such as ENEA (National Agency for New Technologies, Energy and Sustainable Economic Development), GSE (Managing Body of Energy Services), and MISE (Ministry of Economic Development) will participate in funding the training courses and the assistance operations.

The general outcome of the interviews was a **widespread interest** in the project. The Italian stakeholders showed interest in the creation of the HEA network; the municipalities (mostly in the north of Italy) and the foundations supported the possibility of being directly involved in funding the operator's training. Moreover, as emerged from the interviews, many stakeholders showed interest in being engaged in the spreading of knowledge regarding criticalities and problems emerging from Energy Poverty (EP) situations.

Regarding **private actors** a general interest was reported but the definition of a practical (and financial) involvement seems more difficult to be defined. Many stakeholders (Anci-ER, Agenda21, RIenergia, Climate Alliance Italia and Banco dell'Energia) are willing to extend the discussion on Energy Poverty with further Focus Groups or through the information channels within their organizations.

The other topic arising from the interviews was the involvement of the municipalities (Agenda21) and the media (Rienergia) to tackle Energy Poverty. Few stakeholders (CNR-ITAE and ANCI) raised questions and highlighted synergies with energy communities. The idea is that the trained HEAs may be also responsible for supporting and promoting the creation of energy communities which in Italy are just starting off following the very recent publication of the law on the topic.

Finally, as in the great majority of cases, the main barrier arising from the interviews is the financial sustainability of the take-up of the ASSIST models in both implementation models, ASSIST-PA with municipalities and ASSIST-TED Network addressing all operators and funding partners.

The following public and private actors have shown their interest and willingness to collaborate or to enter into further collaboration discussions for the implementation of this Scalability and Delivery model in Italy. (See Annex 3)

It is worth noting that some of the interviews were done with other existing national initiatives (such as the French Rappel Network and the UK Warm&Well programme) to verify the interest in the creation of a European Secretariat. In order to verify this opportunity a European co-creation event is planned for the 5th of July. The creation of a European Secretariat would provide a European frame to the Italian models giving more strength to the models themselves and therefore increasing their growth opportunities.

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Economic viability of the scalability plan

To carry out the project, the corresponding resources will be needed, both for the ASSIST-PA and the ASSIST-TED Network and also for covering the necessary human resources:

ASSIST-PA

Cost	Initial / Annual	Staff	Other costs	2 year	Total costs for the 1st year
Creation of the hub (association - legal support)	Initial		1.000,00		3.000,00 EUR
Financial management of the association	Annual		1.000,00	1.000,00	
Online platform for the association (hosting)	Initial		3.000,00		4.000,00 EUR
	Annual		500,00	500,00	
Creation and update of training resources	Initial	2.800,00			9.800,00 EUR
	Annual	5.000,00	1.000,00	1.000,00	
Creation and update of training resources for intermediary figures	Initial	2.800,00			9.800,00 EUR
	Annual	5.000,00	1.000,00	1.000,00	
Creation and content management of the website (site + hosting)	Initial	8.000,00	4.000,00		20.000,00 EUR
	Annual	4.000,00		4.000,00	
Management of the Hub (event organisation, networking, etc)	Initial				48.000,00 EUR
	Annual	24.000,00		24.000,00	

TOTAL: 94.600,00 EUR

Table 7:
Estimated costs for the implementation of the **ASSIST-PA** model in Italy

RETE ASSIST-TED (ASSIST_HEA NETWORK)

Cost	Initial / Annual	Staff	Other costs	2 year	Total costs for the 1st year
Creation of the Association as a legal body	Initial		1.000,00		3.000,00 EUR
Financial management of the association	Annual		1.000,00	1.000,00	
Management and hosting of the online platform of the for the HEAs	Initial		3.000,00		4.000,00 EUR
	Annual		500,00	500,00	
Creation and updating of training resources for HEAs	Initial	2.800,00			14.800,00 EUR
	Annual	10.000,00	1.000,00	1.000,00	
Creation and updating of working resources for HEAs	Initial				12.000,00 EUR
	Annual	10.000,00	1.000,00	1.000,00	
Publication and content management of the website (site + hosting)	Initial	1.000,00	4.000,00		13.000,00 EUR
	Annual	4.000,00		4.000,00	
Management of the network – organisation of events / working groups / publications / webinar, etc.	Initial				100.000,00 EUR
		50.000,00		50.000,00	

TOTAL: 146.800,00 EUR

Table 8:
Estimated costs for the implementation of the **ASSIST-TED Network** model in Italy

The necessary **financial resources** amount to **241.000,00 EUR** for the first two years (initial costs + annual), from which it is expected to be fully financed both by the public and the private sector

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Steps to reach the financing and set up the model

In order to guarantee the necessary financial resources for the proper implementation of the scalability and delivery model, the following steps will be followed:

- Keep in constant update to the interested stakeholders to reach their commitment with the project.
- Identify and contact new potential stakeholders, public and private to ensure sustainability beyond 2024 and scalability in other areas in 2-3 years' time once the model is consolidated.
- Set further meetings and focus group sessions, if necessary, with the interested stakeholder for discussing more concrete contractual and collaboration issues.
- Negotiate and reach new collaboration agreements, setting requirements, justification material and defining responsibilities.
- Have a common meeting with the committed stakeholders (public and private) for defining rules and obligations in order to avoid any misunderstandings.

The Gantt chart on page 50 plans the different tasks to ensure the financing of the initiative.

Sustainability of the model

The business model is conceived as a mixed one foreseeing the cooperation of both public and private actors. As already stated, the Italian model is conceived as a two-leg system designed to work in synergy but with existing differences.

- For the **ASSIST-PA,** the public sectors would be represented by municipalities financing the project under their SECAPs actions or with social actions willing to end Energy Poverty (the option of an annual fee to be paid to join the program is being analysed).
- For the **ASSIST-TED Network,** companies already operating in the energy field and foundations would provide financial and non-financial resources in view of Corporate Social Responsibility or philanthropic initiatives. At the moment, there are highly interested actors such as Banco dell'Energia and Caritas.

The gathered funds will be used to both sustain the network and finance the training courses and the technical assistance activities.

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Dissemination strategy

The main **channels** envisaged for the dissemination of the model are:

- The **Moodle platform** used for the training, which will be used also to share informative content
- The already **existing network** of social workers and charity institutions, which could be strategic in identifying vulnerable people.
- The creation of a **website** that will work as the Italian Energy Poverty Hub to disseminate both European and national networks and initiatives.

Moreover, the **ASSIST website** (wwww.assist2gether.eu) and **Social Media accounts** (twitter) will be used to spread the word and inform the participants. These existing channels already count with a significant number of followers and the ASSIST name is already known in the sector at EU level.

Moreover, the **AISFOR website and Social Media** will as well give adequate visibility to the project.

It is intended also to count with the communication channels of other involved stakeholders, such as the Municipalities, private companies and other entities participating in the project, in order to gain visibility in a cross-sectorial manner.

Communication and Branding

The communication will address different actors, either as members of the networks and as end-users of the services of the network.

For the **ASSIST-PA model** the direct target will be municipalities and associations of municipalities. The communication will aim to inform them of the existing energy poverty hub and of the services offered by the hub to adhering municipalities. The communication will aim to increase the number of municipalities adhering to the hub so as to have a more budget available and be able to offer more quality and quantity services. In this case the communication will not address the final user of the services as it will be a communication carried out by the municipalities however the hub will provide support to the municipalities in building and delivering the communication towards the final target.

The communication of the **RETE ASSIST-TED** will address mainly all operators on the ground working to support citizens / consumers in need in different sectors (from social to health, to financial, etc.). As for the previous case, the communication will aim to inform the target of the existence of the network and to invite them to join it. The communication will not include financial issues as the network is free for the operators.

In parallel to the communication addressing operators, the communication for the RETE ASSIST-TED will also address potential sponsors to inform them of the results of the HEAs and of the network inviting them to provide for funding.

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Planning and monitoring

Specific objectives

As already stated, each local scalability plan will count with specific objectives and indicators to be accomplished along the implementation of the plan for the next 2 years, from 09/2021 to 08/2023. This Scalability plan aims to:

1. Scale at **national level** – more specifically by covering all National regions – through two models, which will have a full geographical coverage.
2. **Train between 75 and 100 operators** having different backgrounds and operating in different sectors (according to the holistic approach already tested with ASSIST).
3. **Support between 10 and 20 vulnerable people per HEA,** which means between 750 and 2.000 people. The reaching of people and households in need should be facilitated thanks to the bridges and contacts created with the ASSIST project.
4. **Count with the support of local, regional, and national entities** as possible institutions to join the network (both from the public and the private sector) to create a differentiated and sustainable network. The ideal objective is to reach around 20-50 municipalities and a smaller galaxy of other public institutions. And regarding private entities, the ideal will be to engage 15 among associations and companies.
5. **Find the necessary financial resources** for the proper implementation of the scalability plan. The project aims to count with a public-private collaboration in terms of both financial and non-financial resources for the different proposed models. As stated above, for finding the necessary financial resources, more meetings and further negotiations will be held with key stakeholders, to find a perfect balance collaboration point, which will guarantee the necessary financial resources for the implementation of the plan.
6. **Secure the sustainability of the project in the long** run mainly by securing the financial resources. This objective goes in line with the fifth objective; therefore, similar actions will be done such as constant stakeholders mapping and negotiation with the most interested ones in order to set collaboration agreements. Moreover, always high-quality training material and assessment will be done and satisfaction questionnaires will be fulfilled by the end-users in order to show the real importance and impact the project generates.

For this Scalability plan and delivery model, different private actors have participated and provided their perspective both in the topic and in how to address it. However, more companies are needed on board for financing purposes. It is worth noting that Italian companies trust some projects more if they have been executed abroad or if they get in contact with someone from abroad, something that is an opportunity for the Italian model.

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Once the project is operative each stakeholder will receive adequate **benefit for its commitment.**

- **Public Institutions** (municipalities and research bodies) will be able to increase their knowledge and capacity in defining and implementing Energy Poverty strategies to deliver more accurate, efficient and people-centred solutions through professional training and follow up.
- **Social Service Associations** will obtain a substantial revaluation of their work by being provided with the knowledge to support energy vulnerable users and the possibility to become active actors in the society.
- **Actors from the private sector** (mainly companies and foundations) will obtain the possibility to enhance their CSR activities by participating in projects with a concrete positive impact on communities with a longer time perspective. The return in terms of gain of image and visibility for companies having a social commitment on a delicate and actual topic as energy poverty should also be considered.
- **Professional organizations** will offer their experience in a peer-to-peer learning system additional to the standard training system and evaluation actions. Moreover, they will gain benefit from the networking activities.
- **Vulnerable users** will gain a more comprehensive social support through the action of more equipped workers able to provide both essential insights on their real needs and knowledge regarding their energy rights for a subsequent quality of life's improvement.

Indicators and evaluation mechanisms/strategies

The following indicators and evaluation mechanisms will be followed in order to (1) guarantee the correct implementation of the proposed plan, together with the accomplishment of the expected objectives, and (2) for influencing both the policy makers and the people accessing the services in order to catalyse change and action.

Table 9:
Indicators and evaluation mechanisms

Expected Objectives	
Geographical coverage	National
Number of trained advisors	70 – 100 social operators
Attended users	750 – 2.000 people
Number of stakeholders involved (private and public)	20 public (for ASSIST-PA model) and 20 private and social (for RETE ASSIST-TED)
Municipalities commitment level (none – promised to have a look - just dissemination – implementation – policy adaptation)	Policy adaptation
Private sector commitment level (none – promised to have a look – just dissemination – non-financial – financial)	Financial and non-financial

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Environmental and social factors	
Reduction in energy consumption (kWh)	Not applicable
Reduction in CO_2 emissions (CO_2 tons)	Not applicable
Comfort level	Medium – High
Operators' empowerment	High
Increased users' empowerment (i.e., decreased vulnerability to the energy market) (qualitative)	High
Public acceptance of the model (qualitative)	High
Social operators' satisfaction (qualitative)	High
Training material usefulness (qualitative)	High

Indicators will be checked in a constant manner in order to identify possible deviations and apply the necessary corrections with time and in an effective way. It is worth noting that some of the indicators, the social ones, will be measured through the elaboration of questionnaires that will be fulfilled by the end-users and also by the social operators who receive the training and do the assessment actions.

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Gantt chart

The scalability plan of the ASSIST model is conceived as a 2-year plan. The following Gantt chart shows the project planning, including milestones and all necessary activities for reaching them in a timely manner.

Table 10:
Gantt for the Scalability Plan in Italy (ASSIST-PA hub)

Gantt for the Scalability Plan of Italy

ID	Activity for ASSIST-PA hub	Preparatory work September 2021	Sept 2021	YEAR 1												YEAR 2											
			MONTH 1	MONTH 2	MONTH 3	MONTH 4	MONTH 5	MONTH 6	MONTH 7	MONTH 8	MONTH 9	MONTH 10	MONTH 11	MONTH 12	MONTH 13	MONTH 14	MONTH 15	MONTH 16	MONTH 17	MONTH 18	MONTH 19	MONTH 20	MONTH 21	MONTH 22	MONTH 23	MONTH 24
A	**Stakeholders Engagement**																									
B	**Focus Groups with municipalities**																									
C	**Feedback sessions + scalability plan for ASSIST model take-up**																									
D	**Agreement with municipalities for model take-up (hub)**																									
1	Launch of the ASSIST-PA hub																									
2	Network management and communication/ promotion activities																									
3	Semi-annual quantitative managerial milestones																									
4	Revision of working resources for HEAs																									
5	ASSIST-PA training course update																									
6	Revision and updating of the working material - preparation of guidelines for EP in SECAP																									
7	Preparation of a website with information for municipalities																									
8	Communication to municipalities and invitation to join the hub																									
9	Synergies of information and activities with EPAH - European Energy Poverty Advisory Hub																									
10	Organisation of networking events																									
11	Organisation of working groups																									
12	Organisation of annual meeting																									

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European Social Catalyst Fund

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Table 11:
Gantt for the Scalability Plan in Italy (ASSIST-TED network)

Gantt for the Scalability Plan of Italy

ID	Activity for ASSIST-TED network association	Preparatory work September 2021	Sept 2021	YEAR 1												YEAR 2											
			MONTH 1	MONTH 2	MONTH 3	MONTH 4	MONTH 5	MONTH 6	MONTH 7	MONTH 8	MONTH 9	MONTH 10	MONTH 11	MONTH 12	MONTH 13	MONTH 14	MONTH 15	MONTH 16	MONTH 17	MONTH 18	MONTH 19	MONTH 20	MONTH 21	MONTH 22	MONTH 23	MONTH 24
A	Preparation of a briefs and presentation document																									
B	Focus Groups with target groups (social actors and potentially interested private actors)																									
C	Feedback sessions + scalability plan for ASSIST-TED network association																									
D	ASSIST-TED network website publication																									
E	ASSIST-TED training course update																									
F	Revision of working resources for HEAs																									
G	Agreement with financial partners																									
H	Founding of a non-profit association as a legal body (Rete ASSIST-TED)																									
1	Launch of the ASSIST-TED network association																									
2	Network management and communication/ promotion activities																									
3	Semi-annual quantitative managerial milestones																									
4	Preparation of new training resources																									
5	Revision and updates of all training resources																									
6	Training of new operators																									
7	Revision and updating of the working material																									
8	Supporting new HEAs to deliver actions																									
9	Creation of a unique system and database to collect energy consumption data from																									
10	Collection of data from the HEAs work on the ground																									
11	Analysis of data																									
12	Publication of annual report																									
13	Organisation of networking events																									
14	Organisation of working groups																									
15	Organisation of annual meeting																									
16	Network communication/promotion activities																									

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Milestones

The Italian Scalability and Delivery model has established the following milestones:

1. Obtain the necessary financial resources
2. Set a non-profit association
3. Reactivate the existing National Network of HEAs
4. Inclusion of Energy Poverty actions in the SECAPs
5. Launch website and all updated training material
6. Successfully attention of the end-users
7. Ensure the sustainability of the project

Controlling strategies

It is intended to keep a constant control of the overall project along its lifespan, in order to foresee any possible deviations and correct them in a timely manner, following the continuous improvement principles. Therefore, the following controlling strategies will be followed:

- **Managerial follow-up:** monthly meetings will be held with the project stakeholders for general financial and managerial issues. Independently, internal meetings will be held with the social operators, in case things are unclear or suggestions arise.
- **Indicators check:** some millstones will be set at the beginning of the project regarding the expected achievement of the project indicators, so every 6 months; indicators will be checked to see how the implementation is going. The idea is to follow the Earned Value methodology.
- **Reporting activities:** every 6 months a project status report will be done, concerning all different aspects of the project.
- **Reviewing the identified risks:** every time a new risk is identified the risks table will be updated. On Managerial monthly meetings, participants will be asked if they have identified any risk or foreseeable risk. Risks will be monitored and controlled along the project's lifespan, especially the high severity risks.
- **Apply preventive and corrective measures:** in case any risk is materialized the corresponding corrective or preventive strategy defined will be implemented.

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Risk Management

Table below summarizes the identified risks, and details a response strategy for each of them. From the 5 identified risks, 3 of them are considered of medium severity and 2 of low severity, this categorization will determine the prioritization of the risk both in terms of controlling and monitoring and in response.

Table 12: Risk analysis and management

Risk Qualitative Analysis							Response Plan			
ID	Risk	Probability	Factor	Impact Factor	Severity		Name of the response	Description of the response	Strategy	Action
01	The nature of AISFOR, being a private entity working-as an NGO could be negatively perceived as a company willing to make profit	10%	1	1	1	Low	Creation of an Association.	Creation of an Association being the legal representative of the Italian Network	Avoid	Preventive
02	Negative perception of the network from social operators and associations which could consider HEAs as "competitors" in their assistance activities.	40%	2	2	4	Medium	Strong and clear communication.	Develop necessary communication materials to avoid misunderstanding	Accept	Corrective
							Include existing social operators.	Try to form synergies and work together with existing social operators in a collaborative manner.	Mitigate	Preventive
03	Existing legal obligation between ASSIST project partners if the ASSIST "image" will be readopted.	10%	1	2	2	Low	Seek for an agreement with ASSIST project partners.	Talk with ASSIST project partners in advance to look for a solution beforehand and avoid any further legal problems.	Avoid	Preventive
04	Lack of financial stability if the project will be dependent of public/private funds and donations	60%	2	2	4	Medium	Strong and continuous monitoring and communication with possible financial actors	Develop necessary monitoring and communication tools	Avoid	Preventive
05	Political twists could undermine the development of the project.	40%	2	2	4	Medium	Maintain the implementation models independent and not linked with political parties.	Work with non-politically parties	Avoid	Preventive

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Impact – Probability matrix

Through the use of the impact- probability matrix, it will be possible to identify the existing priority risks throughout the project through Severity, which is calculated by multiplying the corresponding probability and impacts defined for each identified risk. This matrix allows having a more visual image of the identified risks, making it easier to have a special focus on the high severity risks.

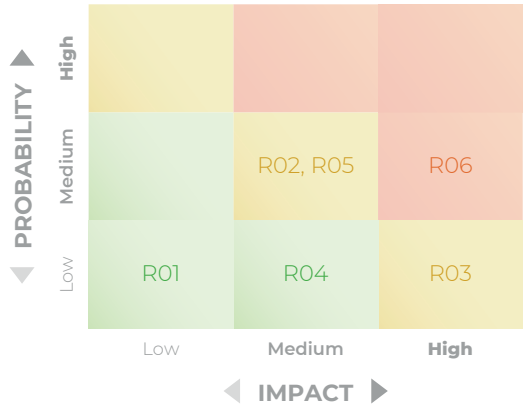

Figure 5:
Impact – Probability matrix

SUITE

SCALING UP INNOVATION TOGETHER
FOR ENERGY VULNERABILITY

PLAN WITH A REGIONAL COVERAGE

Barcelona Region

Spain

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REGIONAL **COVERAGE PLAN**

BARCELONA REGION - **SPAIN**

ASSIST Scalability Plan & Delivery model

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Dissemination Strategy PAGE 69

Communication and Branding PAGE 69

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Analysis of the Local context

On April 5th, 2019, the Spanish Government approved the National Strategy against Energy Poverty 2019-2024 (ENPE), with the aim of establishing the bases that allow carrying out a comprehensive and cross-sectional diagnosis of energy poverty, as well as its evolution and establishing those action measures necessary to reduce the number of households that are in a situation of energy poverty in the time horizon 2019-2024.

From the latest available data on Energy Poverty in Spain, the main indicators showed that there has been a reduction in 2019 with respect to 2018. Nevertheless, in 2019, in Spain 7.6% of the population is considered to be unable to keep their homes at an adequate temperature in winter, and 6.6% have payment delays on their energy bills. Another key indicator regarding energy poverty is the disproportionate spending (when a household dedicates more than 15% of their family income to pay energy bills), according to it, in **Spain**[1] 16.7% of households are under this situation. Moreover, 10.6% of households are under Hidden Energy Poverty, meaning that their energy expenditure is below half of the national median expenditure.

In **Catalonia,** 13.94% of the population face the situation of disproportionate spending, a 6.5% accumulate utility bill arrears, an 8.3 % cannot keep the house at a comfort temperature, and 7.29% are considered to be under Hidden Energy Poverty situation. And, more concretely, in the **Barcelona Metropolitan Area,** in 2016[2] 8.1% of the population were not able to keep the house at a comfortable temperature and 7.1% of the population face the situation of disproportionate spending.

During the **ASSIST project,** different pilots were implemented in Barcelona by working together with the home care services *(SAD – Servicios de Asistencia Domiciliaria)*. Professionals received the elaborated training and make the following action program with the end-users, this action consisted of several home visits to explain the project and get the necessary authorization, passing some ex-ante and ex-post questionnaires, and making the necessary energy assessment and proving tips to behaviour change. The following table summarizes the main obtained results:

Results	SAD Barcelona		SAD Maresme	Telecare	TOTAL
	1st pilot	2nd pilot			
Trained professionals	76	38	10	10	**134**
Initial assessments "ex-ante"	141	85	26	61	**313**
Final assessments "ex-post"	18	19	5	30	**72**
Total number of direct beneficiaries	280	161	54	89	**584**
Impact on the reduction on the energy consumption	4,5%		4,5%	4,5%	
Empowerment factor	3,9%		3,9%	3,9%	

Table 13:
Results of the implementation of the ASSIST project

1 "Indicators of the National Strategy against Energy Poverty", November 2020. Ministry for the ecological transition and the demographic challenge, Spanish Government. - https://www.miteco.gob.es/es/prensa/20201106_actualizaciondeindicadores2020_final__tcm30-516466.pdf

2 "Water and energy poverty in the Metropolitan Area of Barcelona, December 2018. Institute of Regional and Metropolitan Studies of Barcelona. City Hall of Barcelona. - https://iermb.uab.cat/wp-content/uploads/2020/03/5.1.1.-La-pobresa-hidrica-i-energ%C3%A8tica-a-lAMB_2018.pdf

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As an overall result 134 professionals were trained, 313 home visits were made, and 584 people were direct beneficiaries of the service.

How Energy Poverty is currently being tackled in the Barcelona Region

In the Barcelona Region, historically **corrective measures** were more frequently applied for addressing energy poverty, meaning that the public authorities were supporting energy vulnerable users by paying their energy bills. Nevertheless, even though the support was good for the affected families, it was just covering a bigger issue rather than actually solving it. Nowadays, local authorities have opted for **preventive measures,** by providing support and assessment on how to consume more efficiently and on identifying possible energy "leaks" that many users were not aware of.

In this line, in the Barcelona Region there is the example of the **Energy Assessment programs,** where energy advisors would go to vulnerable households to help them understand how they could reduce their bills and what types of additional government aid they may access too. Moreover, in the City of Barcelona, people suffering from energy poverty or vulnerability can access the **Energy Assessment Points (PAEs),** a project that was initiated after a successful pilot phase in 2016 in which 100 people were trained and employed for 6 months as energy agents. They reached 3,000 vulnerable households in three districts within Barcelona. These agents focused on optimizing energy bills and low-cost energy efficiency measures for households under situations of energy vulnerability. Nowadays, Barcelona city counts with 10 Energy Assessment Points, which attended 13.355 households by 2020, considering the special conditions under COVID19. From the beginning of this project, in 2017, 99.225 people were attended, representing 38.419 households.

The management of the PAEs is administered by third sector organisations. Despite the number of this Energy Assessment Point are growing, there are still many places along the Barcelona Region, mainly rural areas, which do not count with them.

PAEs also communicate with social services, the Housing Department and the Energy Agency of Barcelona City Council. They identify potential abuses and violations of the Catalan Law Against Energy Poverty (Law 24/2015). The vulnerable citizens receive information on how to:

- Reduce household energy and water consumption bills, while maintaining or improving home comfort.
- Reduce energy consumption at home.
- Improve their housing conditions through the installation of low-cost measures for energy efficiency within the home.

Even though PAEs are a universal service, which specifically focuses on identifying energy poverty situations that do not reach social services or charities, citizens are the ones responsible to access by themselves this specific service. Due to the fact that in the majority of cases people suffering from energy poverty or vulnerability are the elderly (in 2020, an 11% older than 80 years old and a 17% between 65 and 79 years old), who tend to have more mobility issues (on 2020 196 people attended had reduced mobility), PAEs end up being less accessible in this way[3].

This **accessibility limitation** that was identified in the PAEs system was taken into account in the implementation of the ASSIST model, which thought of providing training and building a network together with social operators from the SAD (local public home care service) and telecare services. These social operators were essential both for

3 Information extracted from the "Technical Memory of 2020" of the PAE project.

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the identification of vulnerabilities and also for helping people get access to these specific services that deal with energy related issues.

For a better understanding, *Servicios de Atención Domiciliaria* (SAD services) are home care services, organized as a set of resources and actions aimed at people who, due to age, dependency or disability, have limited autonomy to carry out the basic activities of daily life or require permanent and remote care. Some of the services that can be included are:

- Hygiene and care of people (bath, body hygiene, change of clothes...)
- Physical-motor assistance (lifting, lying down, walking)
- Feeding and nutrition control. Medication control and health cure.
- Meals at home, cleaning at home (maintenance) and laundry.
- Accompaniment outside the home (medical visits, bank procedures, administrative issues...)
- Orientation in the administration of the home economy. Guidance and support for caregivers.

Additionally, telecare services consist of a telephonic service, connecting vulnerable people's telephone line to a reception centre with which they can communicate in a case of emergency just by pressing a button. From the care centre, professionals attend the consultation and activate the most appropriate resource for the situation: locate family members or contact persons, move a mobile unit to the user's home or activate other urgency services.

Telecare service is a permanent service; it works 24 hours throughout the year. Its objective is to help the elderly, disabled or dependent so that they can continue to live at home, safely and reducing the risk of isolation. In addition to acting in emergencies, the service also acts preventively by maintaining continuous telephone contact with the user.

Innovation scalability proposal

From the implementation of ASSIST it was learnt that there is a special bond between people and the social operators that work with them regularly. Taking this as a basis, including social operators in scaling the ASSIST model along the Barcelona Region is crucial, since they have access to people in situations of vulnerability and with some training can identify and refer people suffering from energy poverty or vulnerability to the specialized services. Moreover, these services have a high presence in the region, as shown by the table below, having a potential reach of 250.000 people approximately[4].

SAD (home care) services			
Geographical coverage	N° of Coordinators	N° of workers/operators	N° of Users
Barcelona city	119	3.300	21.971
Barcelona Region	57 municipal + 100 companies	5.000	34.755
TOTAL	**275**	**8.300**	**56.726**
Telecare services			
Geographical coverage	N° of Coordinators	N° of workers/operators	N° of Users
Barcelona city	35	92	102.919
Barcelona Region	64	92	90.591
TOTAL	**99**	**184**	**193.510**

Table 14:
Home care and telecare services presence in the Barcelona Region

4 Data provided by Barcelona City Council and Barcelona Provincial Council in March 2021, during the elaboration of this Scalability Plan.

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As the previous table shows, there is a huge potential reach by including SAD and telecare services and it will allow our model to have a Regional coverage. Nevertheless, it is important to consider that not all users will be suffering energy poverty or energy vulnerability.

One of our scaling aims is to **design and agree on harmonized referral protocols** that allow people in a situation of vulnerability to access energy advisory services by making use of already existing regional services (SAD and telecare) that have as one of their main target the elderly, disabled, and low mobility people, people that otherwise are highly limited in accessing the existing services (PAEs), if there are any near their home.

Private sector potential

In order to end energy poverty or reduce it in a significant manner, it is essential to address the problem from a systemic and structural perspective, rather than just focusing on helping people pay some of their bills. For doing so, it is needed actions such as buildings retrofitting and training people on their energy rights and on how to consume in a more efficient way. People need to know their rights and what type of benefits they can take advantage of.

Public services are over saturated and nowadays even more due to the pandemic crisis; many times they are lacking human and financial resources to be able to reach their desirable targets. Therefore, Ecoserveis and some of the interviewees and participants in the focus groups, consider essential the collaboration between the public and the private sector for such a social challenge. On the one hand, the public sector has the ability to reach vulnerable people and has the experience in dealing with vulnerable situations, and on the other hand, the private sector has the resources, both financial and non-financial ones.

The **private sector** seeks for a strong Value Proposition that meets their goals and interests, which are:

1. Increase their visibility and improve their reputation.
2. Networking to gain knowledge about the reality, opening the possibility of new contracts (commercial action)
3. Corporate Social Responsibility mechanisms, mainly in the case of big corporations, where this type of initiatives are aligned with their mission, values and strategy.

The proposed model aims to count with the support of the private sector, developing a **public-private collaboration,** something that is yet not very common in Spain, nevertheless existing in similar initiatives as the Rappel network in France with successful results. The support of the private sector, both in financial and non-financial resources, will imply the possibility of increasing the project impact, both in terms of reach with more social operators trained, and in terms of available offered services, allowing to make more home interventions, better follow-up, and so on.

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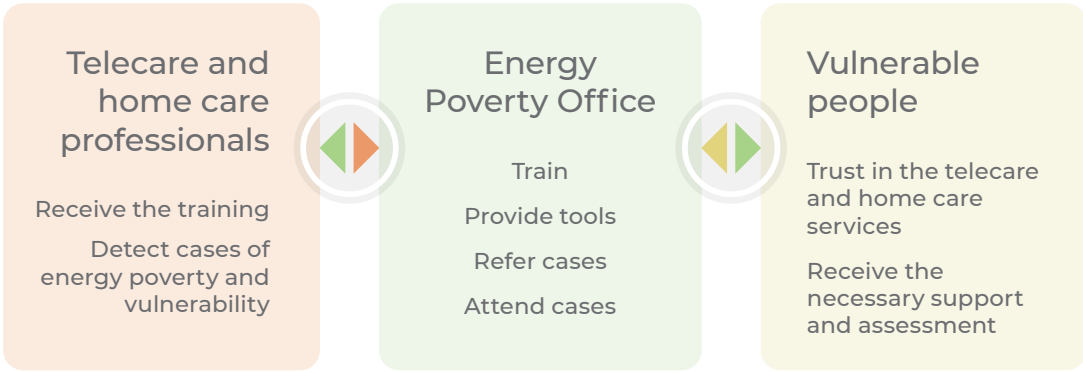
Delivery Model

This Scalability and Delivery model will be focused on Catalonia, having a more concrete reach over the **region of Barcelona.** As stated before, the actual existing initiatives for tackling energy poverty consist of the Energy Assessment Points (PAEs) where energy vulnerable people can either go if they have any nearby. The main identified issues are that PAEs are not all over the territory, even though more are being implemented, and users have to directly access themselves, there is missing a referral system.

The implementation of the model counts with the advantage that the system has already been proved along the ASSIST project, which was piloted by implicating the SAD (home care) and telecare services, and highlighting the importance of the existing emotional bond with the vulnerable users. Additionally, the PAE (Energy Assessment Points) services are getting known and people use them. Taking this fact into consideration together with input from the focus groups and interviews, by creating a **referral Energy Poverty Office for telecare and home care services** in Barcelona region it will be possible to provide a contact point for all those people that do not have any specialized service in their municipality and therefore, home care and telecare professionals do not know where to refer in case of detecting a situation of energy poverty or vulnerability.

Figure 6:
General idea on how the Energy Poverty Office will work



Objectives and functions

This Scalability and Delivery model will be a **public-private** one, meaning that, the public stakeholders will on the one hand, allow their workers, home care and telecare services' operators, to receive the corresponding training for referring the cases to the Energy Poverty Office and on the other hand, will provide the users. And both the public and private stakeholders will be funding the office overall structure (See "Economic and financial viability", page 67). The model will be focused on scaling the entire ASSIST model with the relative resources and tools, of course taking into consideration all adaptations and updates needed. Moreover, the model will scale the training program, providing it to social operators, both from the SAD (home care services) and the telecare services in Barcelona region, in order to help in the detection of situations of vulnerability and/or energy poverty.

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The Scalability and Delivery model will consist in the **creation of an energy advice and support office** for people using the SAD (home care services) and telecare services in the Barcelona region. Therefore, the **specific objectives** of this online office will be:

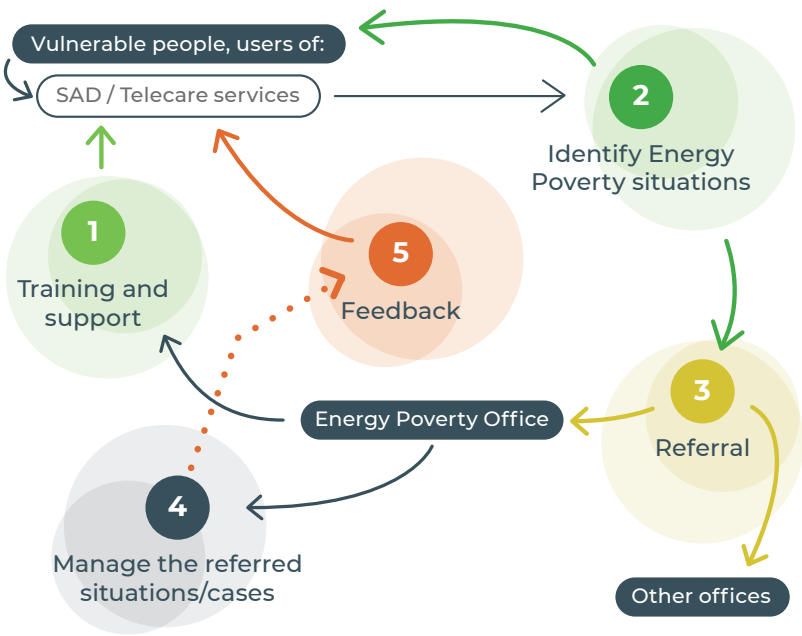
1. Provide high quality training to SAD and telecare operators in order to increase their potential of identification of situations of energy vulnerability.
2. Provide tools to SAD and telecare services to identify situations of vulnerability and/or energy poverty.
3. Create a platform for referring cases detected to other services specialized in situations of vulnerability and/or energy poverty.
4. Attend and manage the situations of vulnerability and/or energy poverty of those municipalities and counties that do not have specialized services in energy rights.

This office will have the following **functions:**

- Define harmonized action protocols in the fight against energy poverty for home care and telecare services of all the municipalities in the region of Barcelona.
- Provide the necessary training to the home care and telecare services' professionals.
- Establish internal referral mechanisms between home care and telecare services and the existing specialized services in energy rights, such as the Energy Advice Points (PAE). This will be done by talking directly with the service providers (social operators) to agree on common referral methodologies. Moreover, tools such as a checklist or digital questionnaire (see figure 9) will be shared as a way of making the identification and referral process more agile and support will be given in developing the referral circuit. This will be done at the very beginning of the implementation of the plan (Gantt, pg. 73).
- Assist the cases of those municipalities that do not have specialized services in energy rights.

Figures 7 and 8 provide a better understanding of how the model will work and how it will be structured.

Figure 7:
Energy Poverty Office structure



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Procedure and offered services

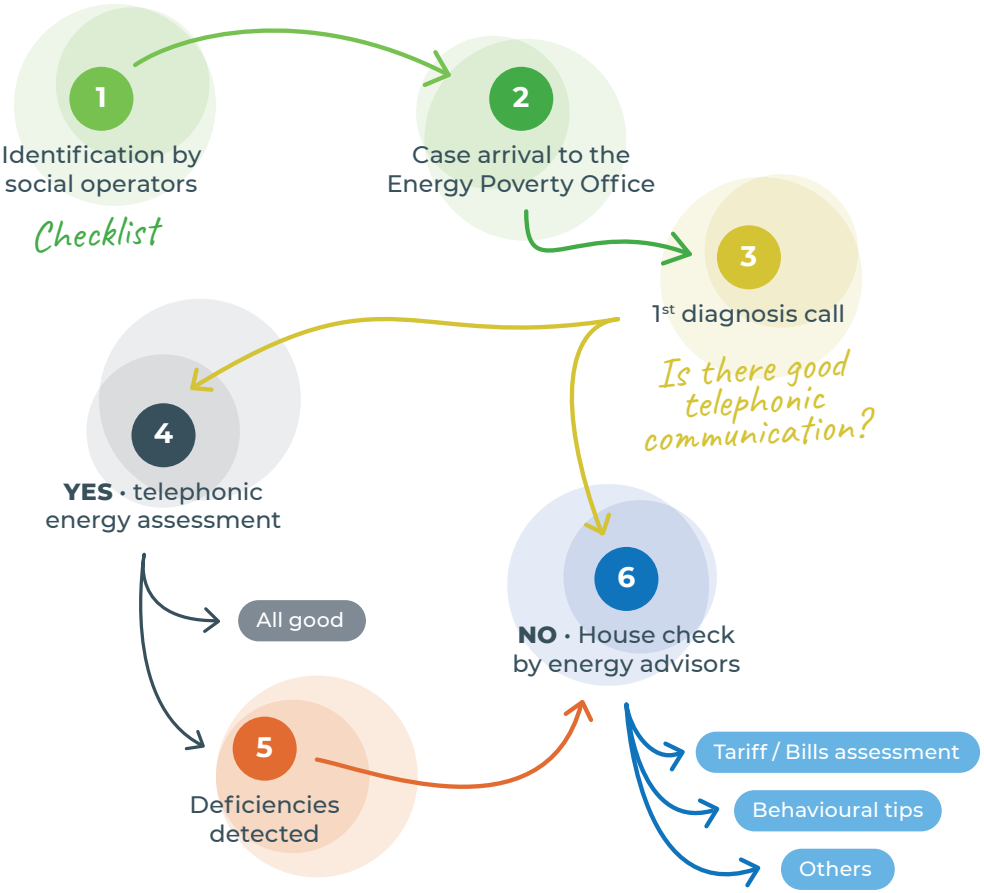

Figure 8:
Energy Poverty Office workflow

1. The first step would be the **identification** of an energy poverty or vulnerability situation by the social operator. As mentioned before, social operators will count with a checklist or digital questionnaire (e.g. Google forms) (Figure 9) with 5 questions that will help in the detection.

Figure 9:
Checklist or digital questionnaire example

QUESTIONNAIRE:

- Does he/she experience hot or cold at home?
- Can he/she pay its bills?
- Does he/she get very expensive bills?
- Does he/she have dampness, leaks or other important deficiencies in their home such as windows in poor conditions?
- Does he/she have energy cuts or notice of supply cuts?

2. Referral to the specific service. If the municipality counts on a specific service and the professional cannot provide support, the file would be handed over to the service. If not, it will be referred to the referral Energy Poverty Office for telecare and home care services in the Barcelona region. When a **case arrives** at the office, thanks to the provided questionnaire it will be possible to determine the severity of the case and set an order of priority for the attention of the identified problem by the home care and telecare professionals.

3. The energy office will make a **first diagnosis call** to evaluate the actual situation of the person and to check if it is viable to make the necessary assessment by phone, whether by talking

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with the affected person or by reestablishing the energy service in the case of an energy cut. This will be done based on the severity of the situation and on the communication availability.

4. If there is **good communication** and not many deficiencies are detected in the house at first, the resolution will be done by phone or video call, or by contacting the necessary external organisations. This person will receive energy advice and if everything is fine the corresponding follow-up will be made and then the case will be closed.

5. If there is good communication and the situation can be solved virtually, the resolution will be done by phone or video call. This person will receive the energy assessment and if while the assessment is being done some **major deficiencies are identified** an advisor will be derived to the house to check the identified deficiencies and provide behavior tips at home and present any possible financial support scheme this person could apply for. Then the corresponding follow-up will be made and finally the case will be closed.

6. If there is **no good communication** or it is not possible to provide the energy assessment by phone, the assessment will be done by home visit, where the necessary assistance will be provided to the users in order to solve the existing problems. Then the corresponding follow-up will be made and then the case will be closed.

Follow-up

A first follow-up will be done one month after the first contact to check whether the detected problem has been solved by the provided support. Then, a **second follow-up** will be done three months after the first contact just for checking in case something was still not working on the first follow-up and to see if everything is still fine in the rest of the cases. If everything is correct after the second follow-up the case will be closed and a report will be elaborated and provided to the referral entity (SAD or telecare). In case there are still some things not going fine, a third follow-up will be conducted.

Offered services

- Energy contracts and Tariff's assessment (bills)
- Tips on habits at home for reducing energy consumption
- Identification of major deficiencies at home
- Information on existing public benefits user can access to
- Support in the elaboration and presentation of aid requests
- General information on existing subventions and other initiatives on retrofitting and renewable energies.
- Energy cuts
- Protection measures management for vulnerable consumers

As mentioned before, the **Energy Poverty Office** will act as an integrated contact point, which is why it will also offer information to citizens in general regarding any existing subventions and other initiatives on retrofitting and renewable energies. Energy poverty is not only about not being able to pay the bills, but also about dedicating more than a 15% of family income to pay energy bills, an issue that a 13.94% of the Catalonian population suffer and cannot be identified by social operators that easily.

Training and accompaniment

As for the **training,** it is expected to train 100 people (50 SAD coordinators and 50 teleoperators of the telecare service) during the two years (50 in the first year and 50 in the second year).

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The training is planned in a specific 8-hour capsule designed to provide the necessary resources to detect cases of energy poverty and the established circuits to refer them to the corresponding services. There will also be 2 hours of continuous training for updates on regulations and circuits relating to energy poverty.

It is worth noting that accompaniment will be available for all social operators along the project, meaning that they will be able to contact the Energy Poverty Office any time they need some support with the identification and referral procedures.

SWOT matrix

The following SWOT matrix is drawn taking into consideration the local context of the Barcelona Region, the expertise and lessons learnt from the implementation of ASSIST and all the input provided by the different actors participating in the focus group and interviews. It consists of the identification of Strengths, Weaknesses, Opportunities and Threats that will be included in the further overall analysis to help to determine different strategies to follow in the decision-making process.

Strengths

- Emotional bond created between professionals and users.
- Training and tasks included in the working day.
- Reach users who are not proactive when requesting specialized services in energy poverty even though they need it.
- The model gives a comprehensive response to vulnerability.
- Addresses climate emergency issues in vulnerable groups.

Opportunities

- Resource optimization: take advantage of already established services.
- The public administration has a lot of interest in carrying out the service.
- The service harmonizes work circuits throughout the region.
- Home care and telecare services are well established and have a lot of future projection.

Weaknesses

- Only telephone-care is not always 100% effective, face-to-face care must be incorporated.
- Lack of funding and private actors may be hard to reach.
- There is no direct economic return on investment.
- Tasks are added to services that are already highly saturated.

Threats

- In the region of action there is not yet much experience in public-private collaboration.
- Difficulty in formalizing a contract at the legal level.
- Difficulty in managing home care service bidding companies (there are more than 100).

Potential Users

Potential users of the service would be all those users of home care and telecare services. The profiles most commonly attended by these services are the elderly, people with reduced mobility or other cognitive difficulties, and people with other types of vulnerabilities.

This way, a total of **1,440 people** are expected to benefit from direct office care over a two-year period (60 people / month).

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Stakeholders Consultation

The aim of having a focus group session and interviews with different actors, representing different sectors that may have a role in the overall proposed model, was to validate its viability. As already stated, the model pursues a **regional coverage** and wants to find a point of collaboration between the public and the private sector in order to guarantee its economic sustainability in the long run.

With this purpose, interviews were held in April and May, while the focus group session was held on the 28th of April. As the next table shows, the Scalability Plan was improved and validated by representatives of both the public and the private sector. Through the focus group session, it was possible to contrast different points of view from the economic, the public and the social perspective, allowing to shape a plan that not only foresees for its sustainability but it addresses in the best possible way the existing needs of vulnerable people in the province of Barcelona.

Table 15:
List of participants to the Focus Group Session and interviews

15 people	15 people
Focus Group Participants	**Interviewed actors**
1. Barcelona Council representative of the local telecare services.	1. Executive Director of Planning, Resource Management and Evaluation (IMSS) - Barcelona City Council
2. Barcelona Council representative of the local home care services (SAD)	2. ABD (Welfare and Development Association)
3. Barcelona City Council representative of the Basic social Resources Management department (IMSS)	3. ACA (Environmental Science Association)
4. District director of Home care services (Suara)	4. Representative of the Chamber of Commerce.
5. Social operator of Home care services (Suara)	5. Head of social Services training – Government of Catalonia
6. Coordinator of the Energy Advice Point of Barcelona (PAE)	6. Head of Social Action Services – Barcelona Council.
7. Caixa d'Enginyers	7. Representative of the Climate Change Office - Barcelona City Council
8. Barcelona Energia	8. Table of entities of the Third Social Sector of Catalonia
9. Sacyr – SAD services	9. Maresme County Council representatives
10. Ecoserveis (organizers)	10. Renting General Director - Banc Sabadell
11. Cluster (co-organizer)	11. Director of Sustainable Development - Foment del Treball
	12. Representative of Rockwool and Director of Foundation La Casa que Ahorra

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From these sessions it was possible to conclude that the idea of creating a **National Network of HEAS,** following the ASSIST model, is conceived as interesting and necessary. Attendees at the focus group and interviews agree that home care and telecare services users can find themselves in situations of energy vulnerability that are not detected. One of the main needs is to define a referral circuit for all these people that are not able to access the existing services by themselves. There exist specialized services for energy assessment (PAEs) but many times people do not know it or do not know where to go. Training professionals in detection services will allow attending more people suffering from energy poverty or vulnerability.

Moreover, the **public sector** is very interested in the model and it is willing to collaborate by providing home care and telecare services. This will be done by making the necessary adjustments in the biding calls for these services, incorporating compulsory training hours on energy poverty following our training program and making use of our resources and tools for these means, in order to count with professionals able to detect energy poverty and vulnerable situations and refer them to the office or to the existing specialized service in the corresponding municipality.

Regarding the **private sector,** some are committed to have a wider look to the proposal and are open to further talking and negotiation to see to which extent they can collaborate, since our model fits on their Corporate Social Responsibility standards. Other private companies have stated that due to managerial issues they are not willing to collaborate with financial means directly, since they require further controls and justification, but they can provide human resources or their expertise for further training, for example in the area of building retrofitting and insulation.

Through the different interviews it was possible to identify big foundations as possible economic contributors, since they are willing to provide funding without any sort of economic return as it is part of their mission. In Spain there exist big foundations providing funds to "social work" and "social action".

The following public and private actors have shown their interest and willingness to collaborate or to enter into further collaboration discussions for the implementation of this Scalability and Delivery model in the Region of Barcelona, Catalonia. (See Annex 3)

Economic viability of the scalability plan

On the one hand, the **human resources** needed to carry out the project amount to **102.300,00 EUR** for the 2 years plan and correspond to the following profiles:

- A coordinator / trainer / expert in energy rights to carry out the tasks of coordinating the office, training the professionals of the home care and telecare services and support in the management of complex cases.
- An energy agent to carry out the tasks of direct attention to the user in terms of advice on energy and water supplies as well as the efficiency and improvement of comfort in the home.

On the other hand, other implementation costs such as setting the virtual office, adapting materials and doing the training and support will amount to **84.928,00 EUR.**

As a result, the total estimated necessary **financial resources** amount to **187.288,00 EUR** and are summarized in the following table:

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Table 16:
Total estimated costs for the implementation of the Scalability and Delivery model in the Barcelona Region

Concept	Total Cost
Personal coordination and direct attention	102.300,00 €
Virtual office	3.000,00 €
Material support for training and referral	1.000,00 €
Training + Action SAD	20.205,50 €
Training + Action Telecare	60.722,50 €
TOTAL COSTS	187.228,00 €

Financing scheme

- On the one hand, it is expected that public funding will cover the costs of home care and telecare services professionals as well as the creation of a virtual office and support material in paper format that would amount to **€ 84,928.00** for the period of two years.
- On the other hand, there is a need to cover, through private financing, the costs of the staff of the energy care office which would amount to **€ 102,300.00** for the period of two years.

Steps to reach the financing and set up the model

In order to guarantee the necessary financial resources for the proper implementation of the scalability and delivery model, the following steps will be followed:

- Keep in constant update to the interested stakeholders to reach their commitment with the project.
- dentify and contact new potential stakeholders, public and private to ensure sustainability beyond 2024 and scalability in other areas in 2-3 years' time once the model is consolidated.
- Set meetings and focus group sessions, if necessary, with the interested stakeholder for discussing more concrete contractual and collaboration issues.
- Negotiate and reach new collaboration agreements, setting requirements, justification material and defining responsibilities.
- Have a common meeting with the committed stakeholders (public and private) for defining rules and obligations in order to avoid any misunderstandings.

The Gantt chart on page 73 plans the different tasks to ensure the financing of the initiative.

Sustainability of the model

The actors involved believe in the long-term sustainability of the model. If a positive impact can be justified, sustainability could practically be ensured through a 100% public funding model.

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In addition, it is also scalable at the geographical level in the rest of Catalonia and at the level of users to other support services for personal autonomy (e.g. supervised flats for the elderly).

Two of the interviewees representing the public sector showed a high interest in the model, approving its viability as a public-mix model, even though some legal changes will be required (see Annex 3). These actors said that the financial means required by the public sector will not be difficult to get for these 2 years plan. Moreover, they pointed out that even though at first, the model will require the private sector's economic contribution, in the long run; there is the possibility for the public sector to fully sustain the model.

Dissemination strategy

Given that the public administrations are the ones that will be offering these services through the home care and telecare professionals; they will be in charge of disseminating the Energy Poverty Office. Additionally, Ecoserveis as well as all the involved stakeholders (public and private) will make use of their networks for disseminating the Energy Poverty Office; it will be another way of collaborating to the project, while increasing its visibility in a cross-sectorial manner.

As general communication of the Energy Poverty Office, the main **channels** envisaged for the dissemination of the model are:

- **Social media,** twitter and Instagram mainly.
- The **ASSIST website** (wwww.assist2gether.eu) and **Social Media accounts** (twitter) will be used to spread the word and inform the participants. These existing channels already count with a significant number of followers and the ASSIST name is already known in the sector at EU level.

Besides, for **direct communication** addressing the telecare and home care professionals so that they are aware of the existence of the office for referring the detected cases of energy poverty, the main channel will be:

- An **internal newsletter,** which will be send by e-mailing, providing a constant updated on situation and achievement of the office.

Even though the main target of the Energy Poverty Office are the social operators and not the end-users, some print dissemination materials will be used, such as **flyers and rollups** and will be available in social services and other local centres that people tend to assist; putting a special focus on the most vulnerable neighbourhoods and municipalities of the Barcelona Region where no specialized services for addressing energy poverty issues are established.

Communication and Branding

In order to define the Energy Poverty Office's image, meetings will be held with the involved actors (private and public) in order to agree on a common and recognizable visual image. Besides the offices' logo, the logos of the funding entities, and the project logo will always be visible in all communication and dissemination materials. It will be important to highlight the participation of the public sector as a way to provide trust to the beneficiaries of the services, showing it is not a company trying to make some sort of economic benefit.

As previously stated the **main targets** of the all communication and dissemination material are social operators of the home care and telecare services, namely:

- The home care and telecare professionals that have been part of the training courses and are aware of the existence of the

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Energy Poverty Office for referring the cases. This group of professionals will keep receiving information about the office in order to be aware of it and of any possible updates made on the services. The intention is also to show them the positive results on the referral of cases as a way of motiving them to communicate about the existence of the office to other colleagues that maybe have not been part of the training process but working closely with situation of vulnerability and therefore are able to detect these situations.

- The home care and telecare professionals that have not been part of the training program, but are also working closely to situations of vulnerability. The intention is to reach as much social operators as possible, so that they are all aware of the Energy Poverty Office and about the available resources, like the checklist questionnaire, that will help them detecting cases of energy poverty and will provide them with the necessary information of who to contact in each case.

For each of them, concrete messages will be design and will be included in all communication and dissemination materials. Messages will always take into account the specific language used by the different targets and will be expressed in an inclusive manner.

Planning and monitoring

Specific objectives

As already stated, each local scalability plan will count with specific objectives and indicators to be accomplished along the implementation of the plan for the next 2 years, from 2022 to 2024. This Scalability plan aims to:

1. Scale at **regional level** – Catalonia, more specifically by covering the region of Barcelona either by referring the identified situation of vulnerability and/or energy poverty to the existing specialized services or by attending cases of those municipalities which do not count with some sort of specialized service.
2. **Train 100 social operators** along the 2 years of the proposed plan, 50 home care professionals and 50 telecare professionals.
3. Reach **1.440 vulnerable users** through trained professionals in 2 years, meaning 60 users per month.
4. Count with the **support of the public administrations** of the region, the Barcelona Provincial Council (Diputació de Barcelona) and the Barcelona City Council (Ajuntament de Barcelona). Representatives of both public bodies have participated in the focus group and interviews, showing a positive response and helping in the definition of realistic indicators.
5. **Find the necessary financial resources** for the proper implementation of the scalability plan. The project aims to count with a public-private collaboration in terms of both financial and non-financial resources. As stated above, for finding the necessary financial resources, more meetings and further negotiations will be held with key stakeholders, mainly private actors, to find a perfect balance between collaboration points, which will guarantee the necessary financial resources for the implementation of the plan.
6. **Secure the sustainability of the project in the long run** mainly by securing the financial resources. This objective goes in line with the fifth objective; therefore, similar actions will be done such as constant stakeholders mapping and negotiation with the most interested ones in order to set collaboration agreements. Moreover, always high-quality training material

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and assessment will be done and satisfaction questionnaires will be fulfilled by the end-users in order to show the real importance and impact the project generates.

As previously mentioned, one of the main challenges of the project is to set the path for further public-private collaboration on such social models. For this Scalability plan and delivery model, different private and public actors have participated and provided their perspective both in the topic and in how to address it. In this line, for the implementation of the model, it counts with the support of Barcelona City Council (Ajuntament de Barcelona), Barcelona Council (Diputació de Barcelona), the Catalan Energy Cluster and C40, a network of the world's megacities committed to addressing climate change, which has already contracted to Ecoserveis for providing training courses.

The private sector has different specific objectives for involving in such an initiative, taking into consideration how the model is structured and expected to work, these actors see an interest in the project on the one hand, to increase their visibility, to get noticed and to improve their reputation by participating in this crucial issue. On the other hand, networking is a key aspect for both gaining knowledge and experience about the reality and for future possible partnerships with the public sector. Finally, this public-private model allows big corporations to implement their Corporate Social Responsibility (CRS) mechanisms, in a project that may be aligned with their mission, values and strategy.

Indicators and evaluation mechanisms/strategies

The following indicators and evaluation mechanisms will be followed in order to (1) guarantee the correct implementation of the proposed plan, together with the accomplishment of the expected objectives, and (2) for influencing both the policy makers and the people accessing the services in order to catalyse change and action.

Table 17:
Indicators and evaluation mechanisms

Expected Objectives	
Geographical coverage	Regional
Number of trained advisors	100 social operators (50 SAD and 50 telecare)
Attended users	1.440 users of the service
Number of stakeholders involved (private and public)	A minimum of 5 (2 public and 3 private)
Municipalities commitment level (none - just dissemination - non-financial commitment - financial commitment - implementation - policy adaptation)	Financial commitment and Policy adaptation
Private sector commitment level (none - just dissemination - non-financial commitment - financial commitment - implementation - policy adaptation)	Financial and non-financial

Continues on next page

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Environmental and social factors	
Reduction in energy consumption (kWh)	647.208,00 kWh
Reduction in CO_2 emissions (CO_2 tons)	135,91 tons CO_2/kWh
Comfort level improvement	Medium - High
Increase operator's empowerment	High
Increase users' empowerment (i.e., decreased vulnerability to the energy market) (qualitative)	High
Public acceptance of the model (qualitative)	High
Social operators' satisfaction (qualitative)	High
Training material usefulness (qualitative)	High

Indicators will be checked in a constant manner in order to identify possible deviations and apply the necessary corrections with time and in an effective way. It is worth noting that some of the indicators, the social ones, will be measured through the elaboration of questionnaires that will be fulfilled by the end-users of the Energy Poverty Office and also by the social operators who receive the training and do the detection and deferral actions, key to the project.

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Gantt chart

The scalability plan of the ASSIST model is conceived as a 2-year plan. The following Gantt chart shows the project planning, including milestones and all necessary activities for reaching them in a timely manner.

Table 18:
Gantt for the Scalability Plan in the Barcelona Region

Gantt for the Scalability Plan in the Barcelona Region

ID	Activity	YEAR 0	YEAR 1												YEAR 2												YEAR 3
		MONTH 0	MONTH 1	MONTH 2	MONTH 3	MONTH 4	MONTH 5	MONTH 6	MONTH 7	MONTH 8	MONTH 9	MONTH 10	MONTH 11	MONTH 12	MONTH 13	MONTH 14	MONTH 15	MONTH 16	MONTH 17	MONTH 18	MONTH 19	MONTH 20	MONTH 21	MONTH 22	MONTH 23	MONTH 24	MONTH 25+
1.	**Stakeholders Engagement**																										
1.1	Mapping of new key actors (public and private)																										
1.2	Preparation of a brief project's presentation document																										
1.3	Negotiation with potential stakeholders																										
1.4	Elaboration of public written collaboration agreements (service/workers)																										
1.5	Elaboration of private written collaboration agreements (funding)																										
2.	**Creation of the Energy Poverty Office**																										
2.1	Contracting workers																										
2.2	Website creating and implementation																										
2.3	Creation of communication materials																										
3.	**Networking with energy poverty services**																										
3.1	Contacting existing energy poverty services																										
3.2	Elaboration of written collaboration agreements																										
4.	**Definition of harmonized protocols**																										
4.1	Creation of referral protocols to specialized services and the office itself																										
4.2	Creation of energy advisory protocols																										
4.3	Elaboration of new additional tools (checklist..)																										
4.4	Protocols updating																										

Continues on next page

European Social Catalyst Fund

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Gantt for the Scalability Plan in the Barcelona Region

ID	Activity	YEAR 0	YEAR 1												YEAR 2												YEAR 3
		MONTH 0	MONTH 1	MONTH 2	MONTH 3	MONTH 4	MONTH 5	MONTH 6	MONTH 7	MONTH 8	MONTH 9	MONTH 10	MONTH 11	MONTH 12	MONTH 13	MONTH 14	MONTH 15	MONTH 16	MONTH 17	MONTH 18	MONTH 19	MONTH 20	MONTH 21	MONTH 22	MONTH 23	MONTH 24	MONTH 25+
5.	**Training on identification of Energy Poverty**																										
5.1	Training update and preparation																										
5.2	Provide the Initial training to the social operators (8h capsule)																										
5.3	Provide training update to the social operators (2h)																										
6.	**Energy Poverty Office Action**																										
6.1	Attending the arriving cases																										
6.2	Support the social operators																										
6.3	Elaborate the reporting documents for the referral entity (SAD / Telecare)																										
6.4	Evaluation of the attended cases																										
7.	**Monitoring and Evaluation**																										
8.	**Sustainability of the model**																										
8.1	Presentation of the project results																										
8.2	Search for new potential collaborators																										
8.3	Negotiation with potential stakeholders																										
8.4	Elaboration of written collaboration agreements																										
8.5	Updating the training material																										
9.	**Replication of the model in new regions**																										
9.1	Stakeholders Mapping																										
9.2	Contacting new potential stakeholders for replicating the model																										

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Milestones

The Barcelona Region Scalability and Delivery model has established the following milestones:

1. Obtain the necessary financial resources
2. Establishment of the Energy Poverty office
3. Defined harmonized advisory and action protocols
4. Providing high quality training to the social operators
5. Successfully attention of the end-users
6. Ensure the sustainability of the project

Controlling strategies

It is intended to keep a constant control of the overall project along its lifespan, in order to foresee any possible deviations and correct them in a timely manner, following the continuous improvement principles. Therefore, the following controlling strategies will be followed:

- **Managerial follow-up:** monthly meetings will be held with the project stakeholders for general financial and managerial issues. Independently, internal meetings will be held with the social operators, in case things are unclear or suggestions arise.
- **Indicators check:** some milestones will be set at the beginning of the project regarding the expected achievement of the project indicators, so every 6 months; indicators will be checked to see how the implementation is going. The idea is to follow the Earned Value methodology.
- **Reporting activities:** every 6 months a project status report will be done, concerning all different aspects of the project.
- **Reviewing the identified risks:** every time a new risk is identified the risks table will be updated. On Managerial monthly meetings, participants will be asked if they have identified any risk or foreseeable risk. Risks will be monitored and controlled along the project's lifespan, especially the high severity risks.
- **Apply preventive and corrective measures:** in case any risk is materialized the corresponding corrective or preventive strategy defined will be implemented.

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Risk Management

The table below summarizes the identified risks, and details a response strategy for each of them. From the 6 identified risks, 1 of them is considered of high severity, 3 of medium severity and 2 of low severity, this categorization will determine the prioritization of the risk both in terms of controlling and monitoring and in response.

Table 19: Risk analysis and management

Risk Qualitative Analysis							Response Plan			
ID	Risk	Probability	Factor	Impact Factor	Severity		Name of the response	Description of the response	Strategy	Action
R01	Add a task that cannot be assumed by the professions of these services (oversaturated system)	30%	1	2	2	Low	Referral of energy care to specialized services	Energy care will not be a task for social operators; it will be derived to specialized energy services offices, existing ones or the new one. Social operators will not be overloaded.	Accept	Corrective
R02	Lack involvement from the private sector for providing economic resources to sustain the model	50%	2	2	4	Medium	Presentation of a strong model	Present the model as an innovative model, showing all benefits that funders will get by being part of it, without having a huge economic impact on them.	Accept	Corrective
							Wider perspective	Reach other types of actors that may be willing to collaborate, not just big companies but also foundations which are already committed to social initiatives.	Improve	Preventive
R03	Delays in changing the necessary legislative aspects for including the compulsory training on energy poverty in the biding calls for social operators	30%	1	3	3	Medium	Take action with time	Knowing how the system works, make sure to talk with the right person and with the necessary time for avoiding any possible delays.	Accept	Preventive
R04	Wrong perception of a public-private model due to greenwashing ideas	20%	1	2	2	Low	Careful selection of participants	Do not include companies with a direct interest in participating in the model to avoid reputational issues (greenwashing) and to protect the users trust on the services.	Avoid	Preventive
R05	Not being able to provide the necessary attention with a purely online and telephonic service	60%	2	2	4	Medium	Performance evaluation of the services	Evaluate how the services are being done and perceived by users and analyse whether it is possible to incorporate face-to-face services along the implementation of the model	Accept	Corrective
R06	Juridical issues for setting the public-private model	40%	2	3	6	High	Take action with time	Knowing how the system works, make sure to talk with the right person and with the necessary time for avoiding any possible delays.	Accept	Corrective

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Impact – Probability matrix

Through the use of the impact- probability matrix, it will be possible to identify the existing priority risks throughout the project through Severity, which is calculated by multiplying the corresponding probability and impacts defined for each identified risk. This matrix allows having a more visual image of the identified risks, making it easier to have a special focus on the high severity risks.

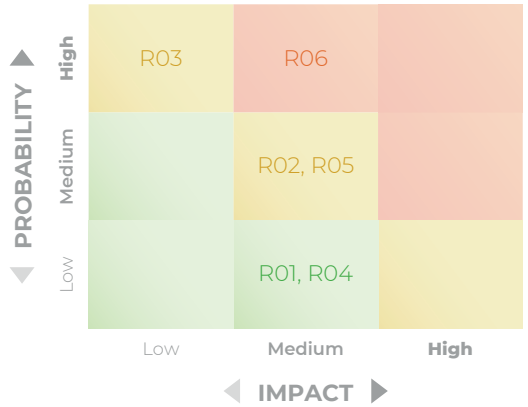

Figure 10:
Impact – Probability matrix

SUITE

SCALING UP INNOVATION TOGETHER
FOR ENERGY VULNERABILITY

PLAN WITH A REGIONAL COVERAGE

Małopolska Region
Poland

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REGIONAL **COVERAGE PLAN**

MAŁOPOLSKA REGION - **POLAND**

ASSIST Scalability Plan & Delivery model

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Stakeholders consultation PAGE 87

Economic viability of the scalability plan PAGE 89

Dissemination Strategy PAGE 90

Communication and Branding PAGE 91

Planning and Monitoring PAGE 91

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Analysis of the Local context

It is estimated that in Poland the problem of energy poverty currently affects about 12%[1] of households (and the scale of the phenomenon is disproportionate to the scale of income poverty) - of which nearly 6% of Poles are energy poor, but not income poor. The problem of energy poverty is also differentiated locally - there are municipalities, where this phenomenon affects a larger number of people and there are others, where this problem almost does not occur. The adopted Energy Policy of Poland until 2040 assumes the reduction of the phenomenon by 30% to a maximum level of 6%.

The implementation of tools to improve the existing situation requires the proposition of a definition of energy poverty into the Polish legislation. That is why, a Team for the Support of Vulnerable Consumers and Reduction of Energy Poverty has been set up by the Minister of Climate and Environment. Apart from working out a definition, the aim of the Team is to identify and develop instruments contributing to the reduction of energy poverty.

In addition to the national level there are also actions at the regional level. In the adopted update of the Air Protection Programme of the Małopolska province there was a provision for the preparation of the analysis of the energy poverty problem in municipalities, in accordance with the guidelines prepared by the Ministry of the Environment. The definition of energy poverty proposed by the above-mentioned team is a starting point for the development of a methodology that can be replicated throughout the country.

1 Energy poverty in Poland, 2012-2016. Description and changes over time, IBS, 2018 - https://ibs.org.pl/en/publications/energy-poverty-in-poland-2012-2016-description-and-changes-over-time/

How Energy Poverty is currently being tackled in Poland

In Poland most of the activities for combating energy poverty are implemented from the bottom up. Only the welfare system (sometimes co-working with municipalities' workers) helps people who are covered by social welfare by advising. There are also some programmes which are focused on funding for exchanging local heating sources and thermal modernisations of buildings (like Stop Smog or Czyste Powietrze (Clean Air in English). Another example was the ASSIST project, funded under Horizon 2020, which aimed to tackle energy poverty by increasing consumer engagement in the energy market, manifested in positive changes in energy consumption behaviour. Within the prepared training programme for Home/Household Energy Advisors (HEA), 160 persons were trained (including Eco-advisors from Małopolska), 53 of them actively participated in the project activities, reaching 2.330 energy poor consumers.

Innovation scalability proposal

Action at the local level must be taken immediately. Preliminary diagnosis of the phenomenon and assistance to vulnerable people should be carried out in cooperation with social services and municipal employees in the framework of community interviews or pre-qualification for Stop Smog or Clean Air programmes. A recent survey conducted by KAPE showed that those who are to support

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vulnerable consumers and carry out an inventory of buildings and thermo-modernisation necessary work will need to improve their qualifications in this field.

The ASSIST model implemented within the SUITE project is a response to the market needs regarding the training of advisors. In Poland, there is no programme, workshop or training dedicated to helping the energy poor. Already during the ASSIST project, after the initial success in the Małopolska region, it was clear that other municipalities in Poland were interested in the training programme.

In addition, the preparation of an online training course addresses the COVID-19 pandemic situation. Training provided through the Moodle platform and the possibility of building an online HEA network can be a greater incentive for future advisors.

Private sector potential

Similar to the situation in other European countries, energy poverty needs to be addressed from a systematic and structural perspective, involving different sectors towards a common goal. Nowadays one of the key identified challenges is funding and public services are overwhelmed by the pandemic crisis, therefore, the collaboration between the public and the private sector is considered to be essential.

The work done on the interviews and organization of focus groups has shown that reaching private companies is not an easy task, since at the moment it not a first goal for any private company, and even more after the economic situation (after Covid19), even if big companies are not really affected by it, they are not in a good moment to get involved in this type of projects.

The **private sector** would get the following benefits by getting involved in the SUITE project:

1. Increase their visibility and improve their reputation. It gives them some assets and knowledge to explain to their stakeholders and their consumers/clients.
2. Economic incentives opening the possibility to new contracts (commercial action)
3. Corporate Social Responsibility mechanisms.

In the case of Poland, one of the main goals of private stakeholders is to improve their relationship with the Municipalities. At the moment, one of the goals of the Scalability model in Poland is to engage as many municipalities as possible; therefore, engaging with municipalities would imply a higher probability of counting with the support and interest of the private sector. Counting with the support of the private sector, both in financial and non-financial resources, would imply the possibility of increasing the project impact, both in terms of reach with more social operators trained, and in terms of available offered services.

Delivery Model

This Scalability and Delivery model at first, is conceived as a **public model,** involving mainly municipalities (municipality workers and social welfare system, which is under municipalities in Poland) interested in implementing measures to reduce energy poverty. The involvement of the **private sector** is intended to be included in further stages of the activities carried out along the implementation of the scalability plan.

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Currently, methodologies for analysing energy poverty in municipalities and action plans to counteract this problem are being developed in Poland. KAPE participates in these preparations: on the one hand, by cooperating with the Marshal's Office of the Małopolska Region (preparation of the strategy of conduct in the communes of the region), on the other hand, with the Team at the Ministry of Climate and Environment, which develops a definition of energy poverty and provides for the possibility of financial support that will be introduced into force together with the amendment of the relevant laws and regulations.

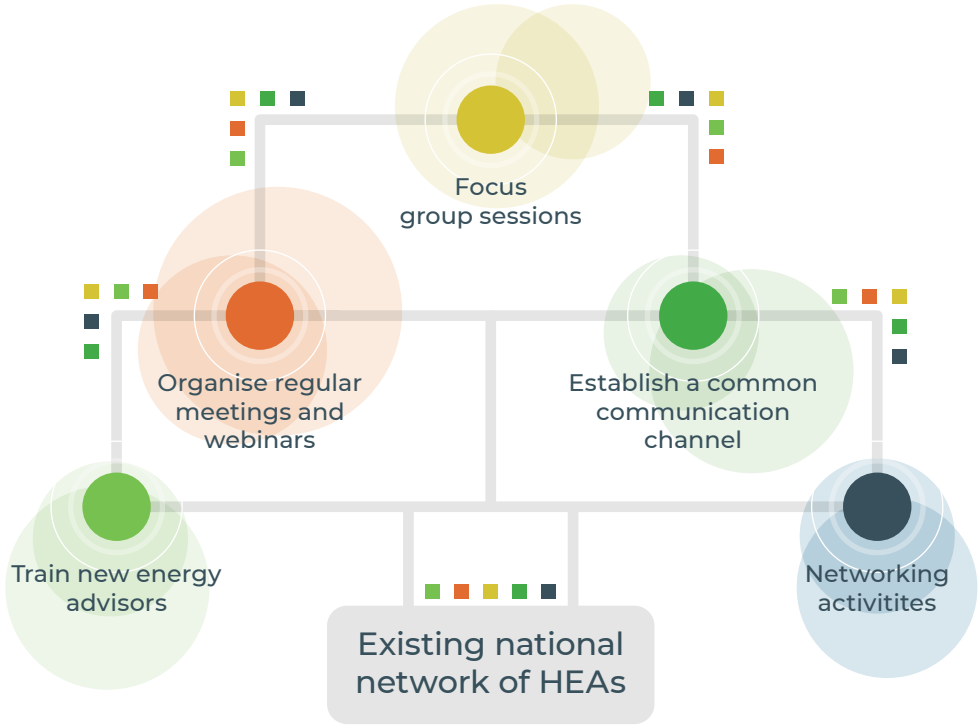
On the basis of the developed policies at the local, regional, and national levels, KAPE plans to support the fight against energy poverty at a larger stage by using ASSIST training and materials on behavioural changes, therefore, the scalability and delivery model.

Besides training new energy advisors by adapting the already existing training materials, the model aims at scaling the already developed **national network of HEAs** during the ASSIST project. So far, the network has been built between everyone who was trained in the ASSIST project. However, it was noticeable that the network only worked well between specific groups - it was difficult to encourage contact between advisors from different groups.

In the majority of cases, contact was hard to keep due to lack of time, large amounts of daily work, and so on. Nevertheless, there are groups, such as the Eco-managers from Małopolska that have a very well-developed network of cooperation among them. It is clear that nobody can force advisors to use various and available tools such as the Moodle Platform; however, this Moodle Platform should remain as a place for possible correspondence exchange with all trained people (easy access).

Building a network is a big challenge, for doing so many different activities are being planned such as the organization of regular meetings/webinars, focus group sessions, having a common communication channel, and networking activities to get more funds and therefore enlarging the network.

Figure 11:
Activities for scaling the existing national network of HEAs



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Objectives and functions

The main objective of the model is to implement the entire resources and methodologies from the ASSIST model at **regional level,** focusing mainly in the Małopolska region, meaning that after training materials are updated, this training will be launched through the Moodle Platform in order to provide social operators, especially from the Małopolska region, with the specific knowledge to identify and assess energy poverty situations,

The **new HEAs** will mainly be employees of communes (in the area of energy and social assistance) of the Małopolskie Voivodeship (new eco-managers). Their involvement will take place to a large extent through the Marshal's Offices (in particular the Marshal's Office of the Małopolska Region). There is a second option in the Śląskie Voivodeship, nevertheless, cooperation with the Marshal's Office is not so good yet, (only if it does not work with the Marshal's Office in such a detailed way as with the Office from Małopolska), where the possible actions are: promotion and dissemination of information on trainings among the communes of the region. However, this option is currently not 100% assured.

Interviews showed a lot of interest in the offered training, so recruiting HEAs for them will not be a problem. **Recruitment** will be done by KAPE with cooperation with local Municipalities and Marshall Offices of the Region. Municipalities which would like to train workers (both working in energy and social issues) will contact Marshall Offices or directly to KAPE. They will register and login in the Moodle Platform and then, with a group of at least 20 people, the training on the Moodle Platform will be opened.

Moreover, the model intends to involve the stakeholders in **two types of actions,** policy and support for advisors:

- First type of roles of the involved stakeholders will be **legislative activities** at the level of statutory solutions implementing the obligations arising from the directive. Assessment of anti-poverty instruments, their improvement or introduction of new ones, definition of the group at risk of energy poverty and development of new systems of housing allowances based on new ideas of energy, housing and credit exclusion (on the regional level). These actions could help advisors to identify and engage vulnerable consumers and people at risk of energy poverty in an easier way. These actions will be provided mainly by the Ministry of Climate and Environment and Marshal Office from Małopolska.
- The second role of stakeholders will be focused on the development, implementation of existing **advisory tools** for residents and advisors, and creation of new ones. The assumption of this action is the possibility of showing the effects of support and source replacement and thermal modernization. These actions will be provided mainly by Małopolska Voivodeship and KAPE.

The advisors will also be supported by an attempt to expand the groups of advisors for energy poor people. The support would be dedicated to municipalities by helping them develop support actions about renovation investments based on private or neighbourhood volunteering, based on their own experience.

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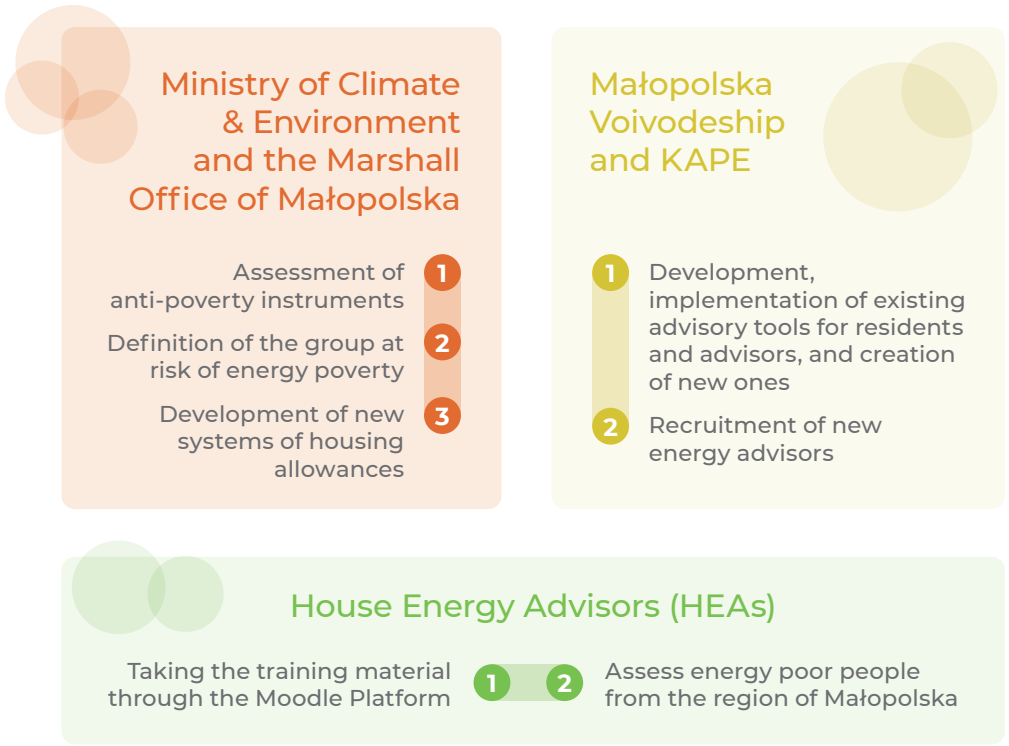

Figure 12:
National Network of HEAs structure

Stakeholders' needs covered by the model

- **Public bodies** (municipalities, social welfare system) will be able to increase their knowledge and capacity in defining and implementing Energy Poverty strategies to deliver more accurate, efficient and people-centred solutions through professional training and follow up. They need more information about identification and ways of engaging energy poor people in actions which they are going to implement. However, a lot of public bodies also need support in planning Energy Poverty strategies. The biggest need and expectation is the possibility of training advisors for free, while the biggest problem is how or who will be paying the advisors.
- The **Ministry of Climate and Environment** asked KAPE to engage in the activities of the team for energy poverty and vulnerable consumers as an entity that has experience in working with advisors and in the field of direct assistance to energy poor people.
- The **Marshal's Office of the Małopolska Region** needs support in developing a methodology for analysing energy poverty so as to be able to adequately support advisors from the region's communes.
- **Other entities,** such as NGOs, also want to take action for the benefit of people suffering from energy poverty. However, the biggest problem and expectation at the moment is finding out how to identify energy poor people and then planning an appropriate way to help them. They are very interested in providing the right tools, technical advice and employee training.

In this line, by scaling the model, it will be possible to bring up many solutions to the different interested stakeholders, therefore increasing

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their involvement in the project. The ASSIST model will therefore play a supporting role for public entities in implementing actions for the energy poor at regional level. On the other hand, as a result of its objective to develop a network of HEAs, it will enable multi-track support in different locations in Małopolska region and at the same time facilitate contact between HEAs. This will make the exchange of experiences, good practices and problematic issues easier and will provide an additional information and education factor.

Procedure and offered services

The measures to be implemented in Poland are based on several aspects.

1. **Definition of the necessary methodology** for analysing energy poverty is needed. Guidelines for such a methodology are currently being developed in the Małopolska Region (in cooperation with the Marshal's Office of the Małopolska Region and KAPE). The document proposed by the Marshal's Office and KAPE can be the starting point for the development of a methodology that can be replicated for the whole country. This methodology is expected to be developed by the end of June 2021. The Methodology foresees the identification of people at risk of energy poverty and ways to reach them. The very first step of the identification is to collect general data that characterise the share of residents exposed to this phenomenon.
2. **Contacting the existing network of HEAs** in order to scale it considering its current situation and also looking for improvement points. Additionally, training materials will be updated and uploaded to the Moodle platform, and the new energy advisors will start being recruited in order to become members of the networks of HEAs.
3. **Analysis on the situations of energy poverty** in their area done by Municipalities. During analysing energy poverty at local level, cooperating with the social welfare system, HEAs will prepare a list of vulnerable consumers who probably are energy poor or in risk of energy poverty.
4. **HEAs Analysis:** (sometimes together with the social welfare system) HEAs will go for **home visits** and fulfil the survey which will be developed when working on the methodology for analysing energy poverty. In this survey there will be questions regarding income, receipt of benefits and allowances, health problems, but also energy-related questions such as thermal comfort, energy consumption, costs incurred for energy, state of buildings, need for repairs, etc.
5. **HEAs Action:** during these visits the HEAs will understand the current situation each of the different vulnerable consumers are living and will therefore provide the necessary energy advice, whether non- and low-investment actions in energy efficiency or energy tips on habits at home or any other sort of energy advice that is needed.

Offered services

- Tips on habits at home for reducing energy consumption
- Identification of major deficiencies at home
- Energy contracts and Tariff's assessment (bills)
- Information on existing public benefits user can access to
- Support in the elaboration and presentation of aid requests
- General information on existing subventions and other initiatives on retrofitting and renewable energies.

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Training and accompaniment

As for the training, it will be 100% online and will be built from the existing tools, resources and materials from the ASSIST project, including the Moodle platform. Training will only require to be updated especially because of the changes in the regulations, but also because of the lessons learnt during the ASSIST Project.

This training will consist of 24 hours of online sessions. Additionally, social operators and municipalities will get technical support in the implementation of the actions designed. Before starting the course, the guideline about how to use Moodle platform will be sent. All the materials in the platform could be only open or could be downloaded. Training course will also contain a short survey to consumers (to be made by HEAs in the advising action). The survey will help HEA to:

- Verify if identified energy poor person/family/household is really energy poor and need support.
- Assist these people in soft actions focused on behavioural changes in energy efficiency at home.

At the end of the course there will be a final exam which should be passed to become a HEA.

SWOT matrix

The following SWOT matrix is drawn taking into consideration the local context of the region of Małopolska in Poland, the expertise and lessons learnt from the implementation of ASSIST and all the input provided by the different actors participating in the focus group and interviews. It consists in the identification of Strengths, Weaknesses, Opportunities and Threats that will be included in the further overall analysis to help to determine different strategies to follow in the decision-making process.

Strengths

- Ability to use the ASSIST network and knowledge to scale the project.
- The knowledge and tools that KAPE already has in the field of training.
- Positive results of the ASSIST Project - great interest in training.
- Growing importance of the problem of energy poverty, action at the national level.
- Growing interest in sustainable development and social issues related to the energy transition.
- Cooperation with other networks of advisors like Eco-Managers from Life IP Małopolska Programme.

Weaknesses

- No definition of energy poverty and problems with identifying people affected by the problem.
- Lack of methodology to analyse energy poverty, lack of databases and problems related to reaching energy poor people.
- Financial instability if the project depends on public / private funds and donations.
- Society's resistance or a sense of shame and concealment of information about energy poverty.

Opportunities

- Possibility to develop and disseminate the concept of counteracting energy poverty as a social problem requiring integrated action with other social entities.
- Cooperation between co-workers of the commune and social assistance.
- Growing cultural interest in sustainable development, air quality improvement and social issues related to the energy transition (and subsequent political attention).
- Existence of a similar successful model in other European countries.

Threats

- Lack of adequate knowledge about the problem of energy poverty can lead to a simplified definition of the problem (with regard to income issues only).
- Reluctance of private entities to undertake financial obligations.

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Stakeholders Consultation

Potential Users

There are two groups of determinants of energy poverty. The first includes elements of building characteristics that affect energy efficiency (age of the building, living space per person and type of heating source). The second group of factors are the socio-demographic characteristics of the population, determining the level of income and the risk of poverty[2].

There have also been many analyses on who is most often affected by the problem. In Poland the most vulnerable to energy poverty are single people living in large houses in the countryside, inhabitants of old, communal tenements in cities, families with many children living in large rural houses and poor residents of detached houses in villages and small towns. (IBS, 2016) Listed groups of people are the main potential users. It is very difficult to identify energy poor people and engage them in the action but by using the experience from the ASSIST project it will be possible to reach them. It is expected to reach **3.000 people.**

The aim of having a focus group session and interviews with different actors, representing different sectors that may pay a role in the overall proposed model was to validate its viability. As already stated, the model pursues a **regional coverage** and wants to find a point of collaboration between the public and the private sector in order to guarantee its economic sustainability in the long run.

With this purpose, interviews were held in April and May, while the focus group session was held on the 06th of May including different actors from the public sector.

As the next table shows, the Scalability Plan was improved and validated by representatives of both the public and the private sector. Through the focus group session it was possible to contrast different points of view from the economic, the public and the social perspective, allowing to shape a plan that not only foresees for its sustainability but it addresses in the best possible way the existing needs of vulnerable people in Poland, more concretely in the region of Małopolska region.

2 Energy Energy Poverty in the Lodz Voivodeship, 2020.

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Table 20:
List of participants to the Focus Group Session and interviews

22 people	11 people
Focus Group Participants	**Interviewed actors**
1. Marshal Office of the Małopolska Voivodeship (3)	1. Marshal Office of the Małopolska Voivodeship
2. Ministry of Climate and Environment (2)	2. Ministry of Climate and Environment
3. Institute for structural research	3. HABITAT
4. National Fund for Environmental Protection and Water Management	4. Municipality of Skawina
5. Municipality of Skawina	5. OPS Skawina (Welfare system)
6. Municipality of Tuchów (2)	6. Municipality of Tuchów
7. Marschal Office of the Silesian Voivodeship	7. OPS Tuchów (Welfare system)
8. Silesia – Śląski Związek Gmin i Powiatów	8. Municipality of Zakopane
9. Forum Energii	9. Municipality of Niepołomice
10. HABITAT	10. Municipality of Raciechowice
11. Federacja Konsumentów	11. Silesia – Śląski Związek Gmin i Powiatów
12. City of Częstochowa	
13. OPS Gliwice (Welfare System)	
14. PNEC – Energy Cite	
15. KAPE (3)	

The overall result of the interviews was an interest in undertaking activities related to the fight against energy poverty under the ASSIST project and the continuation of activities under the SUITE project. Stakeholders have expressed an interest in benefiting from the training developed by the ASSIST project. The greatest interest comes from **public entities;** nevertheless, regarding their interest and willingness of getting involved, the risk that the network of advisers can be built only on the basis of available permanent support mechanisms was highlighted.

Engaging **private actors** is a bigger problem and cooperation with them is currently out of plans for the next two years, nevertheless, the scalability plan contemplates having further meetings with them. At the moment, in Poland there does not exist any example of the involvement of private entities in energy poverty activities. The Marshal's Office of the Małopolska Region once planned to organize this type of cooperation by involving a public-private mix in order to implement activities related to the thermal modernization of buildings and replacement of heat sources, unfortunately the idea was not implemented due to staff and salary shortages.

It is believed that there is a high potential for the development of the **National HEA Network,** therefore programs should be built with experienced people who are critical of current solutions. Moreover, regular meetings should be organized in order to exchange experiences and provide necessary information to advisers, in order to foster knowledge sharing and this way keep updating the energy agents in different fields (legislative changes, subsidies, etc.) after the trainings.

Some public and private actors have shown their interest and willingness to collaborate or to enter into further collaboration discussions for the implementation of this Scalability and Delivery model in the Małopolska Region. (See Annex 3)

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Economic viability of the scalability plan

The **human resources** needed to carry out the scalability plan are the following ones:

- 1 (3 PM) person dedicated to Moodle platform, and hosting space for the platform.
- 1 – 2 (3 PM) persons dedicated to actualization of the trainings.
- 1 (1 PM) person as project coordinator of ASSIST Model in Poland.
- 1 (6 PM) person dedicated to promotion activities.
- 2 – 3 (3 PM) persons dedicated to organizing webinars and meeting among HEA Network (1 person for organizations issues and 2 experts).

There, for the 2 years, the necessary human resources will amount to **128.000 EUR.**

Besides, for the proper development and implementation of the plan, the following resources will be required:

Table 21:
Total estimated costs for the implementation of the Scalability and Delivery model in Poland

Concept	Amount
Human resources	128.000,00 EUR
Implementation and update of the Moodle platform	3.000,00 EUR
Re-creation of a basic training course of 24h	2.000,00 EUR
Hosting space for the platform	3.600,00 EUR
Management and coordination activities	8.000,00 EUR
Network management + promotion activities	4.000,00 EUR
Organization of webinars and meetings among HEA Network	12.800,00 EUR
TOTAL	**161.400,00 EUR**

The total **financial resources** amount to **161.400,00 EUR** for the 2-years, from which it is expected to be financed by one of the following options. At the moment, there are many changes in the Polish regulations, which go hand in hand with external funds.

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Steps to reach the financing and set up the model

In order to guarantee the necessary financial resources for the proper implementation of the scalability and delivery model, the following steps will be followed:

- Keep in constant update to the interested stakeholders to reach their commitment with the project.
- Identify and contact new potential stakeholders.
- Set meetings and focus group sessions, if necessary, with the interested stakeholder for discussing more concrete contractual and collaboration issues.
- Have a common meeting with the committed stakeholders (public and private) for defining rules and obligations in order to avoid any misunderstandings.
- Be aware of changes in the regulation that will favour programmes which will help tackle energy poverty.

Sustainability of the model

There are different options that may help guarantee the sustainability of the model, on the one hand, public bodies (municipalities and social welfare system) can be represented by municipalities financing the project as part of their SECAP activities, energy poverty strategies, consultancy of "Clean Air programme" and other local plans. Therefore, the strategy will be to seek cooperation with priority programmes and bodies which coordinate these funding programmes.

On the other hand, it will be intended to cooperate with the Ministry of Climate and Environment (there are changes in the regulations of energy poverty in Poland, and there is the possibility that there will be programmes which will help in actions against energy poverty in Poland), depending on the programme regulations the activities will be adjusted to the documentations.

In order to implement activities related to the HEA network, it is necessary to obtain additional external financing (the financial sources are not known currently, the possible sources could be national support programmes).

Dissemination Strategy

The main communication **channels** will be:

- The Moodle platform used for training, which could also be used to provide information content.
- The ASSIST website (wwww.assist2gether.eu) and social media accounts (twitter) will also be used to disseminate information and to inform participants.
- KAPE's website (www.kape.gov.pl) and social media will provide the project with adequate visibility.
- Thanks to the cooperation with the Małopolska Voivodeship, it will also be possible to use websites and social media operated by them or cooperating with them, such as the Life Małopolska Project website or EkoMałopolska TV.

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Communication and Branding

The communication, dissemination and information actions will target different actors, starting with the associations of advisors, the advisors (municipal employees and social workers), the vulnerable consumers and the inhabitants of the municipality at risk of energy poverty.

The **first group to be targeted** by the communication measures will be Marshals Offices or associations of social workers. The aim of the communication at this level will be to disseminate information about training and actions taken on energy poverty, but also information about changing legislation or support instruments. The communication channel in this area will be mainly by email.

The **most important group** covered by the communication activities will be the advisors themselves, i.e. municipal employees and social workers. The aim of the communication activities with this group is the same as mentioned before, to disseminate knowledge about trainings and actions taken for energy poverty, but also information about changing legal regulations or support instruments. The communication channel in this regard will be email. There will also be the possibility of communication through the Moodle Platform. Events such as workshops and webinars will also be used for communication actions.

The **last group** will be the final consumers - all the inhabitants of the municipalities, but especially those who are energy poor or exposed to this problem. Activities in this group will mainly support the communication between advisors and vulnerable consumers, with a special emphasis on the inclusion of excluded people. The activities in this group will be based on face-to-face meetings, local events, telephone calls and e-mail contacts. The activities will be characterized by the advisers who will participate in them.

Planning and Monitoring

Specific objectives

As already stated, each local scalability plan will count with specific objectives and indicators to be accomplished along the implementation of the plan for the next 2 years, from January 2022 to December 2024. This Scalability plan aims to:

1. Scale at ASSIST at different levels **local, and regional level,** focusing in the Małopolska region – The main opportunity and potential is in scaling at very local level (in municipalities). It would be best to multiply objectives in different municipalities in whole Poland (starting from Małopolska region) (the aim is to reach at least 40 municipalities; since through a survey launched, more than 40 municipalities answered they plan to engage in actions to reduce energy poverty). The easiest situation is in Małopolska, where Eco-Advisors (who were trained in Life IP Małopolska Programme) work. There are still municipalities in this region where there are no Eco-Advisors employed. Another possibility is the region of Silesian Voivodeship, a neighbour region to Małopolska, or other municipalities, where other advisors could be employed because of implementing Programmes dedicated to vulnerable consumers like "Clean Air" (currently the situation of cooperating with this region is not clear).
2. **Train 75 new advisors** between social workers and municipality workers, since these groups of people work every day with vulnerable consumers and people at risk of energy poverty. The idea is to take advantage of the knowledge that they have and extend it in other topics they are lacking essential knowledge for their daily work. For example, social workers

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would gain more knowledge about energy; and municipality workers, who usually work in the field of energy, would gain more knowledge about social problems and how to talk with vulnerable consumers.

3. **Support 20 vulnerable people per HEA per year,** a number which was checked and proved along the ASSIST project and Life IP Małopolska, which means 1.500 people per year, **3.000 people** on the project's lifespan. The reaching of people and households in need should be facilitated thanks to the bridges and contacts created with the ASSIST project.

4. **Count with the support of local, regional, and national entities** as possible institutions to join the network (both from the public and the private sector). The easiest way to reach vulnerable consumers is by municipalities in cooperation with the social welfare system. The municipalities know their inhabitants best. Other possibilities which were not checked yet, nevertheless, can be considered are Caritas Habitat and other NGOs. Finally, another interesting possibility is the Team for Energy Poverty in the Ministry of Climate and Environment, which have already started their work with vulnerable consumers and energy poor people.

5. **Find the necessary financial resources** for the proper implementation of the scalability plan. The project aims to count, at first, with public collaboration in terms of both financial and non-financial resources. As stated above, for finding the necessary financial resources, more meetings and further negotiations will be held with key stakeholders, not closing the doors to the possibility of engaging with private actors, to find a perfect balance collaboration point, which will guarantee the necessary financial resources for the implementation of the plan.

6. **Secure the sustainability of the project in the long run** mainly by securing the financial resources. This objective goes in line with the fifth objective; therefore, similar actions will be done such as constant stakeholders mapping and negotiation with the most interested ones in order to set collaboration agreements. Moreover, always high-quality training material and assessment will be done and evaluations on the real impact the project generates to prove its effectiveness, fostering the replication in other regions.

Indicators and evaluation mechanisms/strategies

The following indicators and evaluation mechanisms will be followed in order to (1) guarantee the correct implementation of the proposed plan, together with the accomplishment of the expected objectives, and (2) for influencing both the policy makers and the people accessing the services in order to catalyse change and action.

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Table 22:
Indicators and evaluation mechanisms

Expected Objectives	
Geographical coverage	Regional
Number of trained advisors	75 energy advisors
Attended users	3.000 people
Number of stakeholders involved (private and public)	12
Municipalities commitment level (none – promised to have a look - just dissemination – implementation – policy adaptation)	Policy adaptation
Private sector commitment level (none – promised to have a look – just dissemination – non-financial – financial)	Financial and non-financial

Environmental and social factors	
Reduction in energy consumption (kW/h)	750.000
Reduction in CO_2 emissions (CO_2 tons)	563,25
Comfort level improvement	Medium
Increase operator's empowerment	Not applicable
Increase users' empowerment (i.e., decreased vulnerability to the energy market) (qualitative)	High
Public acceptance of the model (qualitative)	High
Social operators' satisfaction (qualitative)	High
Training material usefulness (qualitative)	High

Indicators will be checked in a constant manner in order to identify possible deviations and apply the necessary corrections with time and in an effective way. It is worth noting that some of the indicators, the social ones, will be measured through the elaboration of questionnaires that will be fulfilled by the end-users and also by the social operators who receive the training and do the identification and assessment actions, key to the project.

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Gantt chart

The scalability plan of the ASSIST model is conceived as a 2-year plan. The following Gantt chart shows the project planning, including milestones and all necessary activities for reaching them in a timely manner. It is expected to start with the Scalability of the model in January 2022.

Table 23: Gantt for the Scalability Plan in the Małopolska Region

Gantt for the Scalability Plan of Małopolska Region

ID	Activity	YEAR 0	YEAR 1												YEAR 2												YEAR 3
		MONTH 0	MONTH 1	MONTH 2	MONTH 3	MONTH 4	MONTH 5	MONTH 6	MONTH 7	MONTH 8	MONTH 9	MONTH 10	MONTH 11	MONTH 12	MONTH 13	MONTH 14	MONTH 15	MONTH 16	MONTH 17	MONTH 18	MONTH 19	MONTH 20	MONTH 21	MONTH 22	MONTH 23	MONTH 24	MONTH 25+
1.	**Definition of methodology**																										
1.1	Analysis and data collection of the residents' situation																										
1.2	Meeting of the Team for energy poverty made in the Ministry																										
1.3	Elaboration of guidelines for addressing energy poverty																										
1.4	Negotiation with potential stakeholders (municipalities and other bodies)																										
2.	**Scaling the Network of HEAs**																										
2.1	Contacting the already existing member																										
2.2	Updating communication materials (website, platforms...)																										
2.3	Recruitment of new HEAs																										
3.	**Adaptation of the training material**																										
3.1	Training courses update																										
3.2	Creation and feed into local materials to online platform																										
4.	**Training courses for HEAs**																										
5.	**HEAs Action**																										
5.1	Community interviews and home visits																										
6.	**Network management and communication/promotion activities**																										
6.1	Organization of webinars and meeting among HEA Network																										
6.2	Communication and promotion activities																										
7.	**Monitoring and Evaluation**																										
7.1	Annual impact analysis and satisfaction surveys																										

Continues on next page

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Gantt for the Scalability Plan in the Barcelona Region

ID	Activity	YEAR 0	YEAR 1												YEAR 2												YEAR 3
		MONTH 0	MONTH 1	MONTH 2	MONTH 3	MONTH 4	MONTH 5	MONTH 6	MONTH 7	MONTH 8	MONTH 9	MONTH 10	MONTH 11	MONTH 12	MONTH 13	MONTH 14	MONTH 15	MONTH 16	MONTH 17	MONTH 18	MONTH 19	MONTH 20	MONTH 21	MONTH 22	MONTH 23	MONTH 24	MONTH 25+
8.	**Sustainability of the model**																										
8.1	Presentation of the project results																										
8.2	Evaluate the project reach and the acceptance of the results																										
8.3	Search for new potential collaborators																										
8.4	Negotiation with potential stakeholders																										
8.5	Elaboration of written collaboration agreements																										
8.6	Updating the training material																										

Milestones

1. Define a strong methodology for addressing energy poverty in Poland.
2. Enlarge the existing network of HEAs
3. Provide high quality training to the energy advisors.
4. Ensure the sustainability of the project.

Controlling strategies

It is intended to keep a constant control of the overall project along its lifespan, in order to foresee any possible deviations and correct them in a timely manner, following the continuous improvement principles. Therefore, the following controlling strategies will be followed:

- **Managerial follow-up:** half-yearly meetings (M6, M12) will be held with the project stakeholders for general financial and managerial issues.
- **Indicators check:** some millstones will be set at the beginning of the project regarding the expected achievement of the project indicators, so every 6 months; indicators will be checked to see how the implementation is going. Annual impact analyses and satisfaction surveys with municipalities adopting the model (M12, M24)
- **Reporting activities:** every 6 months a project status report will be done, concerning all different aspects of the project.
- **Reviewing the identified risks:** every time a new risk is identified the risks table will be updated. On Managerial monthly meetings, participants will be asked if they have identified any risk or foreseeable risk. Risks will be monitored and controlled along the project's lifespan, especially the high severity risks.
- **Apply preventive and corrective measures:** in case any risk is materialized the corresponding corrective or preventive strategy defined will be implemented.

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Risk Management

The table below summarizes the identified risks, and details a response strategy for each of them. From the 6 identified risks, 1 of them is considered of high severity, 1 of medium severity and 4 of low severity, this categorization will determine the prioritization of the risk both in terms of controlling and monitoring and in response.

Table 24: Risk analysis and management

Risk Qualitative Analysis							Response Plan			
ID	Risk	Probability	Factor	Impact Factor	Severity		Name of the response	Description of the response	Strategy	Action
01	Existence of other training materials on the current market	30%	1	2	2	Low	Tested training	The ASSIST training is already available and for free, plus it has already been proved and provided positive results	Accept	Corrective
							Value added training	Updating the existing tools, materials and resources keep the programs' quality	Accept	Corrective
02	Social workers work overload may limit their activities	40%	2	2	4	Medium	Look for external funds	Look for external funds that would imply more resources for social workers to reduce their overload and therefore reduce activity limitations	Accept	Corrective
03	Existing legal obligation between ASSIST project partners if the ASSIST "image" will be readopted.	30%	1	2	2	Low	Seek for an agreement with ASSIST project partners	Talk with ASSIST project partners in advance to look for a solution beforehand and avoid any further legal problems.	Avoid	Preventive
04	Financial instability if the project depends on public / private funds and donations	50%	2	3	6	High	Taking part in funding programmes. Contact with funding bodies.	Direct contact with funding bodies and taking part in financial programs dedicated to tackling energy poverty together with municipalities or without them help to find more possibilities.	Mitigate	Preventive
05	Lack of methodology to analyse energy poverty, lack of databases and problems related to reaching energy poor people	30%	1	2	2	Low	Implementation and adaptation of the Methodology made for Małopolska Region	Małopolska is the first region that prepares and plans to implement Methodology of analysing energy poverty at local level. The document and actions planned in it could be replicated.	Accept	Accept
06	Society's resistance or a sense of shame and concealment of information about energy poverty	40%	2	1	2	Low	Education and information actions	Municipalities should organise education and information actions at local level to inform people about energy poverty and possibilities to reduce this problem. They can also encourage public participation.	Accept	Corrective
							Engaging welfare system	Welfare system has the biggest experience in working with people who could feel as excluded so this could help in reaching them and engaging in the ASSIST Model.	Accept	Corrective

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Impact – Probability matrix

Through the use of the impact- probability matrix, it will be possible to identify the existing priority risks throughout the project through Severity, which is calculated by multiplying the corresponding probability and impacts defined for each identified risk. This matrix allows having a more visual image of the identified risks, making it easier to have a special focus on the high severity risks.

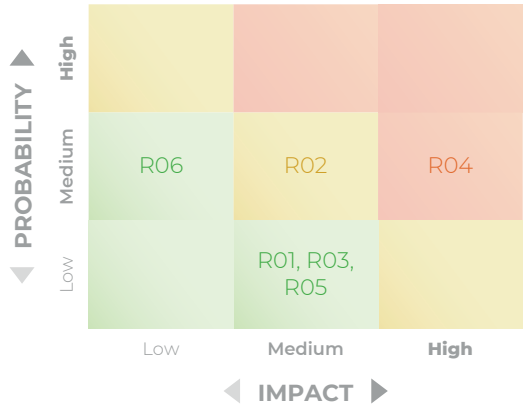

Figure 13:
Impact – Probability matrix

SUITE

SCALING UP INNOVATION TOGETHER
FOR ENERGY VULNERABILITY

PLAN WITH A LOCAL COVERAGE

Cluj-Napoca
Romania

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LOCAL **COVERAGE PLAN**

CLUJ-NAPOCA

ROMANIA

ASSIST Scalability Plan & Delivery model

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Analysis of the Local context

Energy poverty is a phenomenon that touches various dimensions of the Romanian society. Studies conducted by the Centre for the Study of Democracy (2018) indicate that around 20% of the households are affected by various forms of energy poverty. From a more analytical perspective, based on various conventional cost indicators, the percentage of the energy poor in 2018 was evaluated at the following level: Twice the National Median (2M) – approx. 13%; Low Income High Cost (LIHC) – 12%; Hidden Energy Poverty (M/2) – 15,5%, indicators which are on the rise, as compared to previous years (Sinea, 2018). The European Union Survey on Living Conditions (EU-SILC) reports on more qualitative data on energy poverty. According to this, in 2019, 13,7% of the Romanian population had arrears on utility bills (EUROSTAT, 2021); whereas the percentage of the population that was unable to keep their house adequately warm was 9.3 in 2019 (EUROSTAT, 2020). All these indices display only aspects of energy poverty manifestations in Romania. The households that receive some kind of non-financial protection are not quantified (Sinea, 2018).

If it is to consider a definition of EP, then there are several factors that should be taken into account. Firstly, it is a question of affordability (households cannot afford to heat or to cool their houses properly). Secondly, households do not have access to modern means of energy, aspect present especially in post-communist countries. As factors that exacerbate energy poverty, beside the low-incomes and the poor access to infrastructure, the quality of the buildings, the poor consumption patterns and the legal framework are equally important dimensions. In terms of effects, energy poverty leads to social exclusion and can hinder basic rights, such as the educational and socio-economic development of individuals.

When it comes to geographical distribution, energy poverty is equally present in both urban and rural areas. While there are not necessarily forms of pockets of energy poverty, in urban areas the phenomenon touches mainly the low-income families living in energy inefficient buildings (mainly panel-type multifamily building blocks, but also single-family units). In rural areas, around 80% of the households use wood for heating, have limited access to modern energy infrastructure, and their buildings are highly inefficient. There criteria overlaps the low and irregular incomes most people have in the rural areas.

In addition to this urban/rural division, in Romania there are also forms of extreme energy poverty, which include informal living, scarcity and no access to energy infrastructure (electricity and/or gas). Roma communities, but not only, are the most affected by this form of energy poverty. As an example, 7% of the households do not have access to electricity or are connected illegally to the grid.

Existing regulations

So far, energy poverty was mainly addressed in the Romanian legal framework in the Law 123/2012, as the primary law, and by the ANRE regulations, as secondary legislation. The primary law does not define energy poverty as a distinct term, but explicitly defines the vulnerable customer as a limited category, being "the final customers belonging to a category of household customers who, due to age, health or low income, are at risk of social marginalization and who, in order to prevent this risk, benefit from social protection measures, including financial measures". A new legal draft envisions a clear definition of the vulnerable consumer and the criteria for obtaining

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heating benefits. The bill was initiated by the Ministry of Labour and Social Affairs, and now it is in the process of public consultations.

Other important legislation sets the standard of energy efficiency in buildings (Law 372/2005 and Law 101/2020) and regulates the mechanisms for thermally rehabilitating the building stock (Government Decree 18/2009), especially the multifamily building blocks. Important to mention is that energy efficiency legislation does not directly address the problem of energy poverty and neither the legal provisions that set the framework for thermal rehabilitation, even though there is an increased potential to tackle the phenomenon directly through these provisions.

How Energy Poverty is currently being tackled in Romania

- **Financial and non-financial mechanisms:** Energy poverty is currently approached through a heating aid system through the Ministry of Labour and Social Affairs and the institutions in subsidiary. Beneficiaries receive a percentual compensation of heating fuel bills depending on household income and fuel used. The system is well institutionalized, however the criteria employed and the application-based allocation limits many from accessing benefits. Non-financial mechanisms are mainly in the form of prohibition from disconnection and they exclusively apply to the ill impaired whose lives depend on electricity, despite several other categories being included in the category under law. Other national programmes have aimed at installing PVs or insulating households but have been limited in scope or little functional due to bureaucracy or lack of funding. Private funds through bank loans are usually destined to households that are solvable. Various NGOs have privately developed particular models on relief that apply at a very small scale: community mediation, provision of fair priced electricity to households which are not connected to the grid, the installation of PVs to isolated communities.
- **Thermal rehabilitation:** Thermal rehabilitation programmes have been implemented during the pre- and post-accession period on EU and national grants. So far only 5% of the residential buildings have been rehabilitated, however, so far targeting based on energy vulnerability has not been operated. Mainly multifamily buildings have been rehabilitated, whereas single family buildings, which are almost 60% of the residential facility, have been at a disadvantage. Most of these rehabilitations have been superficial (below 30%). Single family households have a particular manifestation of energy poverty due to their low structural quality and location in the rural area, where heating is based up to 80% on highly polluting wood burning processes. Recent programmes aimed at thermal rehabilitation have been not functional due to lack of funds and administrative capacity.

Innovation scalability proposal

This model innovates through its approach. There has never been in Romania a project that addresses energy poverty by **creating a network of energy advisers.** Moreover, the project will be piloted at local level, assessed and then readapted. In the process of creating the network, local and regional stakeholders will be involved in a consultation process, both in designing training materials and sending people for becoming professional energy advisors.

The model will be **tested in the municipality of Cluj-Napoca,** the second wealthiest city after Bucharest. Cluj-Napoca is the suitable place for testing the model because the city is a mosaic of situations: energy poverty manifestations appear in various neighbourhoods,

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including the rich ones; in the city there are households with low incomes located in inefficient multifamily building blocks; people display consumption patterns that are unsustainable and lead to high energy costs; at the outskirts of the city there is an entire community that lives in informality and disconnected to the grid.

In addition, in a context of low trust in institutions, people living in Cluj-Napoca tend to trust the local public authorities more than they trust the national authorities. For these reasons, creating a local network of energy advisors, collaborating with the local authorities and bringing various stakeholders on board, and generating practical knowledge in such an environment, makes this model innovative.

Private sector potential

Similar to the situation in other European countries, energy poverty needs to be addressed from a systematic and structural perspective, involving different sectors towards a common goal. Nowadays one of the key identified challenges is funding and public services are overwhelmed by the pandemic crisis, therefore, the collaboration between the public and the private sector is considered to be essential.

The work done on the interviews and organization of focus groups has shown that reaching private companies is not an easy task, since at the moment it is not a first goal for any private company, and even more after the economic situation (after Covid19). The Romanian Model has to start with public authorities and then partner with professional organisations. However, municipalities must take the lead.

The private sector would get the following benefits by getting involved in the SUITE project:

1. Increase their visibility and improve their reputation. It gives them some assets and knowledge to explain to their stakeholders and their consumers/clients.
2. Economic incentives opening the possibility to new contracts (commercial action)
3. Corporate Social Responsibility mechanisms.

Energy poverty is a big issue in Romania, in both urban and rural areas. The private sector is aware of this problem and it is willing to leave the conversation open with the SUITE project. There are already other initiatives regarding this issue, so the conversation is open and the problem is acknowledged which is already a very big step towards tackling energy poverty in Romania. Nevertheless, private actors may not be ready for a financial contribution to this model, since they do not know exactly how they can fit in the organisation in terms of energy advisers, whether to train them themselves or trained by the model, to hire other employees to do this specific job, etc.

The private stakeholders proposed to first go to the community to see how it goes and after the model is implemented, they will be willing to help. At the moment, they showed an interest in giving feedback on training material and sent their workers to be trained in the programme. Moreover, there is a lot of bureaucratic resistance to change and a high workload; it is difficult to get them involved when they are already involved in other social projects and have a lot of work.

Counting with the support of the private sector, both in financial and non-financial resources, would imply the possibility of increasing the project impact, both in terms of reach with more social operators trained, and in terms of available offered services.

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Delivery Model

The scalability of the ASSIST model in Romania will be focused in the city of Cluj-Napoca, being the main public stakeholder the **municipality of Cluj-Napoca,** with a focus on the Department of Social Assistance and the Department of Energy Efficiency, where there is an interest for addressing the problem of energy poverty. For the robustness of the model, all the other stakeholders should partner with the local authorities and provide their input. One of the biggest challenges of this model will be the limited time of the stakeholders, as their workload is already very high.

In Romania the creation of a **National HEA network** involves the creation of local networks from scratch, which can then be extended at the national level. All interviewees consider that the model should be piloted firstly locally and, after a rigorous process of assessment, expanded nationally.

For the **local level,** here are the steps to be pursued indicated during interviews:

1. Establishing partnerships with all the relevant stakeholders between them.
2. Designing an operational plan (financial plan, coordinator of the process, key activities and tasks, timetable).
3. Designing the content of the training. Materials should be in Romanian.
4. Consulting with professional organizations and other stakeholders involved on the viability and clarity of the training materials.
5. Conducting the training, starting with the Department of Social Assistance and the established networks within the department (community mediators, elders' clubs, etc.). Continue the training with the NGOs and their networks and all the other stakeholders involved.
6. Supporting formed energy advisors to replicate their knowledge.
7. Design an app that can be used on phones, where part of the counselling materials can be incorporated in an interactive and digital manner. The app should be designed for households who may manifest various forms of vulnerability but are not necessarily energy poverty and it will be an instrument able to accompany training.
8. Pilot the one-stop-shop, with the support of the municipality.
9. Assessment of the models and activities implemented.

Objectives and functions

The Scalability and Delivery model will have a **strong public component,** since both financial and human resources can be used for piloting the model and reaching the target group. In addition, a partnership with private institutions, including professional organizations, NGOs and companies is encouraged and necessary for the viability of the project.

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The main objective of the model is to implement the entire resources and methodologies from the ASSIST model at **local level,** meaning that after training materials are updated, this training will be launched through a mobile app in order to provide social operators from the Department of Social Assistance with the specific knowledge to detected energy poverty situations.

For piloting the model and making sure that there is a genuine commitment to create the network of advisors, it is planned to involve the following stakeholders:

- The Department of Social Assistance (including Centrul de Zi pentru Varstnici – elderly centre and community mediators).
- Department of Energy Efficiency from the Cluj-Napoca Municipality.
- NGOs – Fundatia pentru Dezvoltarea Popoarelor (The Foundation for People's Development), O Masa Calda (A Warm Meal), Focus Eco-Center`.
- Professional organizations – Romanian Society of Energy Auditors and Managers (SAMER), Civic Imagination and Innovation Center (CIIC).
- Universities – Babeș-Bolyai and the Technical University who run specialised educational programs in social assistance or energy efficiency respectively.

Being a varied group of stakeholders, specific roles have been envisioned for each of them. As such, it is aimed to train the first energy counsellors with the help of the Department of Social Assistance (be it community mediators, people part of the elders' group or other social workers) who is currently involved in identifying vulnerable households of various categories and handing out energy poverty benefits. The Department of Energy Efficiency designs local strategies and programs on energy efficiency and is currently extending its activity to also cover households, which have previously not been part of the program. As the respondents have suggested, these two departments should collaborate to develop a network of energy counsellors and there the one-stop-shop.

Furthermore, the social workers and representatives of the NGOs can be trained to identify and engage with the vulnerable consumers. Professional organizations and the universities will be valuable in designing the training materials and widening the network of program beneficiaries to other stakeholders.

Public administration	Social NGOs	Professional organizations and Universities
1st energy counsellors (Department of Social Assistance)	Trained to identify and engage with vulnerable consumers	Designing and adapting training materials
Design local strategies and programs on energy efficiency, extending to households (Department of Energy Efficiency)		Widening the network
		Possibility of becoming advisors

Figure 14:
Stakeholders' roles

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Stakeholders' needs covered by the model

- **Public administration** (the Department of Social Assistance with all its workers and interest groups alongside the Department of Energy Efficiency) will improve their knowledge and understanding on energy poverty and will adapt their strategies and measures for this category of citizens. Moreover, within their existing networks Cluj-Napoca municipality departments will be able to identify the vulnerable consumer and design solutions based on the needs much easier. By possessing grass-root knowledge the Department of Social Assistance can involve the vulnerable consumer in the active process of learning, tailoring solutions directly with the person in need. However, one of the biggest challenges mentioned during the interviews and focus groups is the financial dimension of the project. Who will pay for the training? And who will pay to support the energy advisors? As potential solutions for these financial challenges, is to start to model with a European funding and then find other financing alternatives with the stakeholders. For example, the municipality can co-finance the model if the pilot proves functional and suitable for addressing energy poverty. Also, the municipality can attract other European and Governmental funds for keeping the network active and viable.

- The **social NGOs,** having good grass root knowledge can be trained and increase their capacity in finding solutions for energy poverty and deliver the message in the group of vulnerable consumers.

- The **professional organizations** can be involved in the design of the training materials, but also have access to other networks of potential energy advisors. For example, SAMER is in contact with the energy auditors who have a very good technical understanding of the situation and can give valuable input in this regard. In addition, the energy auditors can be trained themselves as energy advisors and have a more social understanding of the problem of energy poverty. Their on-field activity can be very valuable for the vulnerable consumer, especially when they collaborate with the municipalities, as one of the interviewees suggested. During the focus-group discussions, SAMER looked interested in being actively involved in this project.

- The **universities** are hubs of knowledge. But more than this, students from the Faculty of Social Assistance can become energy advisers and work together with the Department of Social Assistance from the municipality. Trained students can split the burden of the social workers and use the existing networks to reach out to the vulnerable consumers. The biggest challenge remains the financial dimension.

Procedure and offered services

For developing and implementing the training, one of the first steps is to **establish the network of partners** that support the implementation of the ASSIST model. Once the network is established and partners engage into the project, understanding their responsibilities and commitments, the coordinating team will establish the operational plan, including the calendar of activities. The next phase will imply the **development of the training materials,** where feedback and support will be asked to the Romanian Society of Energy Auditors and Managers. Once the training materials are finalized and are in Romanian, through the partners of the project **participants at the training will be recruited.** Our aim is to train 15 people per year coming from various networks (Social Assistance Municipalities Department, social NGOs, professional organizations

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like SAMER, students, private companies). The training will have a mixed component – online and offline. In case the pandemic situation will not allow it, then the training will be exclusively online.

The aim is to **train people that have various professional backgrounds** and through them to assist the vulnerable consumers from various communities. For example, social workers from the Department of Social Assistance (Cluj-Napoca municipality) are in contact with the Elderly Clubs. Having low-incomes and living in inefficient buildings, the elder people are one category of potential vulnerable consumer. Capacitating the social workers with the tools and knowledge from the training, they will be able to advise the people in need. Moreover, representatives from the Elderly Clubs can be formed as energy advisers and they can assist their peers in need. In a similar pattern, the NGOs that provide social services have access to various vulnerable groups. Once trained, these workers can reach the people in need. The concept behind our approach is the **snowball method.** It is aimed to reach the most important nodes of the network and afterwards they can offer the energy advisory services to other communities in need. In the second year of the project, after assessing the initial steps, with the support of Cluj-Napoca municipality, it is **aimed to pilot a one-stop-shop model,** considered as a good complementary solution for addressing energy poverty, the one-stop-shop represent a one step further for institutionalizing the energy advisors' network.

Finally, according to the type of vulnerability people are confronting with, the energy advisors can offer counselling on various areas with potential impact:

Offered services

- Behavioural changes towards heating
- Using energy efficient appliances to reduce energy consumption
- Social benefits (including heating benefits)
- Counselling and support to navigate the bureaucratic system
- Support for accessing funds for thermal rehabilitation

While there are a variety of situations that can be covered and it is impossible to foresee all the scenarios, energy advisors will touch two main components within their activity: behavioural changes recommendations and access to social and financial benefits advice.

Training and accompaniment

As for the **training,** it is expected to train at least 15 people per year.

Depending on the pandemic situation and the preference of the participants, training will be organized either online or on sight, or both, and will be supported from the existing tools, resources and materials from the ASSIST project; nevertheless, an app will be created. Training will only require to be updated, adapted and to be translated into Romanian.

This training will consist of approximately **6 sessions** of specific general information on energy poverty; causes and effects, situation on the ground in Romania as compared to EU, Romanian and European legislation, existing solutions (financial, non-financial, etc.) good practices and analysis of situations on the ground, etc.

SWOT matrix

The following SWOT matrix is drawn taking into consideration the local context of Romania, on the expertise and lessons learnt from the implementation of ASSIST and on the topic of energy Poverty, and all the input provided by the different actors participating in

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the focus group and interviews. It consists in the identification of Strengths, Weaknesses, Opportunities and Threats that will be included in the further overall analysis to help to determine different strategies to follow in the decision-making process.

Strengths

- Direct access to the target group by accessing the existing networks (public authorities and NGOs)
- Good relationship with Cluj-Napoca municipality based on previous working experience and on our status – research center, part of Babes-Bolyai University.
- The municipality has a genuine interest in understanding and tackling energy poverty.
- Professional organizations are interested in finding solutions for the vulnerable consumer.
- There is a growing interest in climate changes and this subject can be used when discussing the manifestations of energy poverty.

Opportunities

- Since energy poverty is still a new concept, it is possible to pilot within this model a successful program of tackling energy poverty.
- There is an interest in the Romanian Parliament for this problem and the agenda can be pushed forward.
- Cooperation between stakeholders can make the model viable.
- New European Funding opportunities.

Weaknesses

- Limited financial resources.
- Limited interest from the companies to support the ASSIST Model.
- The municipality doesn't have an office or a designated person to deal with energy poverty.
- Poor general awareness on the concept of energy poverty.
- While energy poverty is a constant in the rural area, there are limited resources (financial and human resources) to pilot the model in rural communities.

Threats

- Large municipalities have a better capacity to absorb funds, leaving the rural or smaller ones in a vulnerable position and with limited resources.
- Social workers fatigue in getting involved in another project.
- If incentives are not attractive, trainees may look for other job opportunities.

Potential Users

Potential users of the service would be all those users that confront energy vulnerability. While they may be dispersed all across the city or in the surrounding areas, most likely all of them have low or medium-low incomes, live in inefficient buildings and may already be confronted with other forms of vulnerabilities (age, health conditions, disability, etc.). In addition, there is the potential that some beneficiaries may live in informality or in social houses and their vulnerability is exacerbated.

This way, a total of **300 people** is expected to benefit from the model over a two-year period.

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Stakeholders Consultation

The aim of having a focus group session and interviews with different actors, representing different sectors that may pay a role in the overall proposed model was to validate its viability. As already stated, the model pursues a **local coverage** and wants to find a point of collaboration between the public and the private sector in order to guarantee its economic sustainability in the long run.

With this purpose, interviews were held in May, while the focus group session was held on the 27th of May including different actors from the public sector.

As the table shows, the Scalability Plan was improved and validated by representatives of both the public and the private sector. Through the focus group session, it was possible to contrast different points of view from the economic, the public and the social perspective, allowing to shape a plan that not only foresees for its sustainability but it addresses in the best possible way the existing needs of vulnerable people in Romania, more concretely in the city of Cluj-Napoca.

Table 25:
List of participants to the Focus Group Session and interviews

10 people	10 people
Focus Group Participants	**Interviewed actors**
1. Municipality of Cluj-Napoca, Representative from the Energy Efficiency Department - technical officer.	1. Municipality of Cluj-Napoca, Representative from the Social Assistance Department - Chief Social Service Department.
2. A representative from the Warm Meal Association -cofounder.	2. A representative from the Romanian Green Building Council - Executive Director.
3. The director of ProNZEB think-tank.	3. Municipality of Alba-Iulia, a representative from the Energy Efficiency Department - Technical expert on energy efficiency.
4. A representative from ENEL - Head of Department.	4. A representative from the Foundation for People's Development - Director.
5. Ashoka Romania, Expert on Energy Poverty - Regional Director.	5. Technical University, Expert on Energy Efficiency - Cluj Municipality Energy Manager.
6. University of Economic Studies, Expert on Governance and Energy Policies - Associate Professor, energy expert.	6. A representative from the Focus Eco-Center NGO.
7. A representative from the Local Energy Agency of Alba Iulia - Director.	7. A representative from the Civic Imagination and Innovation Center - Cluj Municipality Public Investment Officer.
8. A representative from the Union of Tenants Association, HABITAT - National Director.	8. Babes-Bolyai University – Expert on Energy Poverty.
9. A representative from Metropolitan Area Association - Executive Director.	9. E.ON – Corporate Social Responsibility Expert.
10. University of Babes-Bolyai – Expert on Energy Poverty.	10. Romanian Society of Energy Auditors and Managers - Director.

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After conducting the interviews and the focus-group, all participants consider the idea of the project as suitable for addressing energy poverty. All stakeholders expressed their interest either in receiving the ASSIST training or in sending their colleagues or recommending it to their close professional network.

However, public authorities together with the NGOs seem to have the **higher interest in this model**. One of the reasons is that **public authorities** have the institutional capacity to support this kind of project as they are already in contact with vulnerable households through various aid programs. Moreover, they have access to other networks of social workers that can play an active role in the ASSIST Model (community mediators, elders' social groups, etc.). **NGOs,** as well, engage in partnerships with the public authorities and possess know-how on how to implement such models.

Professional organizations consider the model in line with their objectives and are willing either to share their expertise and/or to be trained for becoming energy advisors.

In the case of **companies** (utility companies), while they consider the model robust, there is no clear interest in the training and not yet a feeling of purpose. But, even in this scenario, there remains a window of opportunity for creating partnership between local authorities, companies and other professional organizations.

Lastly, the **universities** are interested in both contributing to the training package and in partnering with the other stakeholders.

The following public and local actors have shown their interest and willingness to collaborate or to enter into further collaboration discussions for the implementation of this Scalability and Delivery model in the city of Cluj-Napoca, Romania. (See Annex 3)

Economic viability of the scalability plan

On the one hand, the **human resources** needed to carry out the scalability plan amount to **137.600,00 EUR** for the 2 years plan and correspond to the following profiles:

Program management:

- Program manager
- Program officer
- Stakeholder engagement officer
- Trainers
- Technical assistant

Beneficiaries

- Course participants
- 2 one-stop-shop officers

On the other hand, other implementation costs such as setting the network, developing the mobile App, adapting materials and doing the training and support will amount to **17.400,00 EUR.**

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As a result, the total estimated necessary **financial resources** amount to **155.00,000 EUR** and are summarized in the following table:

Concept	Amount
Trainers fee	12.000,00 EUR
Conception and design of the training materials	5.000,00 EUR
Online course platform for training materials	5.000,00 EUR
Energy Adviser App	5.000,00 EUR
Training venue	2.400,00 EUR
Management activities	28.800,00 EUR
Program secretariat	16.800,00 EUR
Technical support	7.000,00 EUR
Stakeholder engagement	12.000,00 EUR
Incentives for the trainees	25.000,00 EUR
Salaries for at least two people for the one-stop-shop	36.000,00 EUR
TOTAL COSTS	155.000,00 EUR

Table 26:
Total estimated costs for the implementation of the Scalability and Delivery model in Cluj-Napoca, Romania

The implementation of the scalability plan is expected to be financed through European grants and/or other private financial mechanisms.

Steps to reach the financing and set up the model

In order to guarantee the necessary financial resources for the proper implementation of the scalability and delivery model, the following step will be followed:

- Keep in constant update to the interested stakeholders to reach their commitment with the project.
- Identify and contact new potential stakeholders.
- Set meetings and focus group sessions, if necessary, with the interested stakeholder for discussing more concrete contractual and collaboration issues.
- Negotiate and reach collaboration agreements, setting requirements, justification material and defining responsibilities.
- Have a common meeting with the committed stakeholders (public and private) for defining rules and obligations in order to avoid any misunderstandings.

The Gantt chart on page 116 plans the different tasks to ensure the financing of the initiative.

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Sustainability of the model

As all interviewees indicated that the **HEA Network** should be firstly piloted at municipality level and local authorities should play an important part in this process, there are some aspects that should be addressed to ensure the sustainability of the project:

1. **Local Authorities** – While there is a constant pressure on the budget of local authorities and the development of an ASSIST network may represent an immediate additional burden (both financially and in terms of human resources), some interviewees explained that one solution for this challenge is the absorption of both national and European Funds. As energy poverty becomes more acknowledged, municipalities can attract funds for supporting the creation of the network and the implementation of the one-stop-shop solution. For instance, the Ministry of Local Administration and Development can support these kinds of initiatives.

   In addition, the Regional Operational Programmes or other financial instruments can represent an opportunity for the sustainability of the initiative. At a future stage, the network should be backed up by a legal framework that supports and describes the purpose and the means of functioning.

2. **Partnerships with all the relevant stakeholders** – In order to make the model sustainable, all the relevant stakeholders should partner with local authorities. In this sense, **professional organizations** (energy auditors) should be active in both the design of the training, but also in being trainees to become energy advisors themselves. Since energy advisors offer their consultancy based on request, public authorities can collaborate with them and use their knowledge and skills to conduct household energy investigations and provide tailored solutions for the vulnerable consumers. As such, professional organizations have the potential to become an important node in the network and offer their services to people affected by energy poverty.

3. Beside professional organizations, the **NGOs** that offer social services can play an active role and collaborate directly with the municipality to offer energy advice to vulnerable households. **Companies** (utility companies – gas and electricity) that have already implemented communitarian projects can provide their input in making the ASSIST model sustainable. They can also provide financial support and human resources that may contribute to the creation and maintenance of the network. Last but not least, **universities** not only can share their expertise, but departments such as the Faculty of Social Assistance can partner with the municipality by providing students that can be trained as energy advisors and work closely with public administration departments and other NGOs to reach out to vulnerable households.

4. In addition, to develop the **app and course online platform,** the knowledge and skills of the students/staff of the Communications Department will be used, or make a call for solutions – as a hackathon – where students will be encouraged to participate and design the application.

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Dissemination Strategy

For disseminating the model and engaging professionals in the trainings the following **channels** will be used:

- Engage with the existing networks – academic, professional, NGOs, public authorities, mass-media. Send newsletters to these networks.
- Use social media accounts.
- Promote the ASSIST Model and the website wwww.assist2gether.eu.
- Promote the online platform where the training materials will be uploaded.
- Participate at local TV and radio shows to promote the ASSIST model.

Communication and Branding

Communication and branding will be performed exclusively in a targeted manner. The programme will be disseminated through the institutional network possessed by our organization, which comprises the most important actors in the area (public institutions and decision-makers, private companies and NGOs). Calls on admission to the programme will be circulated periodically to these actors. These calls will be complemented with personal engagement with these actors. The Centre for the Study of Democracy (CSD) is widely involved in policy-making events. Programme related information will be disseminated through these events also where appropriate. The development of the programme will be performed in close cooperation with these partners. They will be engaged in input and programme design; therefore they will feel engaged in the process, in supporting the programme with participants, dissemination and otherwise.

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Planning and monitoring

Specific objectives

As already stated, each local scalability plan will count with specific objectives and indicators to be accomplished along the implementation of the plan for the next 2 years, starting on 2022 if possible. This Scalability plan aims to:

1. Scale ASSIST at **local level,** starting in Cluj-Napoca, with the potential to pilot the model in Alba-Iulia and Targu-Mures. These three municipalities represent two of the most developed NUTS3 Regions in Romania (North-West and Center). Cluj-Napoca is the second most developed city after the capital city, Bucharest, an university city, an economic center, a highly new technologies focused locality with advanced strategies on efficient energy consumption. According to a recent study conducted by the Center for the Study of Democracy, energy poverty is not displayed in pockets, but rather dispersed across the city in both old and new buildings affecting various categories of the population (elderly people, low and sometimes medium income families especially). Alba-Iulia is a medium sized city, with high ambitions on digitalization and smart technologies. The city and nearby villages are highly industrialized. The municipality collaborates with NGOs and professional organizations on energy efficiency strategies. Targu-Mures is a medium sized city, with little exposure to energy efficiency prospective or energy poverty strategies, but with a public administration open to dialogue and the new inputs on energy efficiency, climate actions and energy poverty. In addition, Targu Mures is the headquarters of one of the largest electricity and gas providers operating in Romania.
2. **Train at least 15 people per year** from different categories, with the ambition to reach a higher number of people. To scale up the ASSIST model, it is intended to reach and train people from the following categories/sectors: social and municipality workers, community mediators, social workers, energy advisors, energy company employees, representatives of NGOs working in the field or in related areas and researchers from universities. These groups of people either interact on a daily basis with the vulnerable consumer or their work may have an impact on the vulnerable consumers.
3. **Support 10 vulnerable people per HEA per year.** In order to reach the vulnerable consumer, existing network of contacts and organisations will be used, such as: social workers will contact the beneficiaries of heating aid and other social benefits, including the people living in social houses; the energy advisers will contact the inhabitants of households; the community mediators will discuss with the most vulnerable categories of people, including the ones that confront with extreme manifestations of energy poverty.
4. **Count with the support of local entities and organizations** to join the network (both from the public and the private sector) and to pilot the ASSIST model. Some of these local actors

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are (1) NGOs - Foundation for People's Development (FPD), Romanian Foundation for Children, Community and Families (FRCCF), Centrul de zi pentru varstnici, A Warm Meal (O Masa Calda); (2) municipalities - Cluj-Napoca, Alba-Iulia, Targu-Mures; (3) professional organizations - Romanian Society of Energy Auditors and Managers (SAMER), Civic Imagination and Innovation Center (CIIC), proNZEB, Romanian Green Building Council (ROGBC); (4) companies - ENEL, Electrica, E.ON; Universities – Technical University, Babeș-Bolyai University (UBB).

5. **Find the necessary financial resources** through European grants or other private grants (foundations).

6. **Sustain the model in the long run** mainly by securing the financial resources. This objective goes in line with the fifth objective; therefore, similar actions will be done such as constant stakeholders mapping and negotiation with the most interested ones in order to set collaboration agreements. Moreover, always high-quality training material and assessment will be done, and satisfaction questionnaires will be fulfilled by the end-users in order to show the real importance and impact the project generates.

Indicators and evaluation mechanisms/strategies

The following indicators and evaluation mechanisms will be followed in order to (1) guarantee the correct implementation of the proposed plan, together with the accomplishment of the expected objectives, and (2) for influencing both the policy makers and the people accessing the services in order to catalyse change and action.

Table 27:
Indicators and evaluation mechanisms

Expected Objectives	
Geographical coverage	Local
Number of trained advisors	At least 30
Attended users	300 people
Number of stakeholders involved (private and public)	5
Municipalities commitment level (none - just dissemination - non-financial commitment - financial commitment - implementation - policy adaptation)	Potential to involve with no financial commitments
Private sector commitment level (none - just dissemination - non-financial commitment - financial commitment - implementation - policy adaptation)	Potential to involve with no financial commitments.

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Environmental and social factors	
Reduction in energy consumption (kW/h)	Not applicable
Reduction in CO_2 emissions (CO_2 tons)	Not applicable
Comfort level improvement	High
Increase operator's empowerment	Medium
Increase users' empowerment (i.e., decreased vulnerability to the energy market) (qualitative)	High
Public acceptance of the model (qualitative)	High
Social operators' satisfaction (qualitative)	High
Training material usefulness (qualitative)	High

Indicators will be checked in a constant manner in order to identify possible deviations and apply the necessary corrections with time and in an effective way. It is worth noting that some of the indicators, the social ones, will be measured through the elaboration of questionnaires that will be fulfilled by the end-users and also by the social operators who receive the training and do the identification and assessment of vulnerable consumers.

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Gantt chart

The scalability plan of the ASSIST model is conceived as a 2-year plan. The following Gantt chart shows the project planning, including milestones and all necessary activities for reaching them in a timely manner. It is expected to start with the Scalability of the model in 2022.

Table 28:
Gantt for the Scalability Plan in the city of Cluj-Napoca, Romania

Gantt for the Scalability Plan Cluj-Napoca city

ID	Activity	YEAR 0	YEAR 1												YEAR 2												YEAR 3
		MONTH 0	MONTH 1	MONTH 2	MONTH 3	MONTH 4	MONTH 5	MONTH 6	MONTH 7	MONTH 8	MONTH 9	MONTH 10	MONTH 11	MONTH 12	MONTH 13	MONTH 14	MONTH 15	MONTH 16	MONTH 17	MONTH 18	MONTH 19	MONTH 20	MONTH 21	MONTH 22	MONTH 23	MONTH 24	MONTH 25+
1.	**Establishing partnerships with relevant stakeholders**																										
1.1	Mapping of new key actors (public and private)																										
1.2	Preparation of a brief project's presentation document																										
1.3	Negotiation with potential stakeholders																										
1.4	Elaboration of written collaboration agreements																										
2.	**Design the operational plan**																										
2.1	Adapt this Scalability plan if necessary																										
2.2	Financial plan																										
2.3	Distribution of tasks and responsibilities																										
3.	**Study programme setup (including organizational details and content)**																										
3.1	Review of training from local perspective																										
3.2	Adaptation and translation of training to local circum-stances																										
3.3	Designing new content if needed																										
3.4	Professional organization consulting																										
4.	**Recruitment of participants**																										
5.	**Conducting the training courses**																										

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Gantt for the Scalability Plan Cluj-Napoca city

ID	Activity	YEAR 0	YEAR 1												YEAR 2												YEAR 3
		MONTH 0	MONTH 1	MONTH 2	MONTH 3	MONTH 4	MONTH 5	MONTH 6	MONTH 7	MONTH 8	MONTH 9	MONTH 10	MONTH 11	MONTH 12	MONTH 13	MONTH 14	MONTH 15	MONTH 16	MONTH 17	MONTH 18	MONTH 19	MONTH 20	MONTH 21	MONTH 22	MONTH 23	MONTH 24	MONTH 25+
6.	**Network development**																										
6.1	International network integration of course participants																										
6.2	Dissemination of programme at the national level for recognition																										
6.3	Recruitment of new participants																										
6.4	Design and creation of the Mobile App																										
7.	**Piloting the one-stop-shop model**																										
8.	**Monitoring and Evaluation**																										
8.1	Impact analysis and training course optimization																										
9.	**Sustainability of the model**																										
9.1	Presentation of the project results																										
9.2	Search for new potential collaborators																										
9.3	Negotiation with potential stakeholders																										
9.4	Elaboration of written collaboration agreements																										
9.5	Updating the training material																										

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Milestones

The Cluj-Napoca city Scalability and Delivery model has established the following milestones:

1. Setting-up the working plan and establishing the programme coordinator.
2. Designing the training materials.
3. Recruiting the participants, contracting the trainer and conducting the training.
4. Support the trainees in passing on their knowledge and skills.
5. Assess the model and implement it in other municipalities.

Controlling strategies

It is intended to keep a constant control of the overall project along its lifespan, in order to foresee any possible deviations and correct them in a timely manner, following the continuous improvement principles. Therefore, the following controlling strategies will be followed:

- **Managerial follow-up:** monthly meetings will be held with the project stakeholders for general financial and managerial issues. Independently, internal meetings will be held with the social operators, in case things are unclear or suggestions arise.
- **Indicators check:** some millstones will be set at the beginning of the project regarding the expected achievement of the project indicators, so every 6 months; indicators will be checked to see how the implementation is going. The idea is to follow the Earned Value methodology.
- **Reporting activities:** every 6 months a project status report will be done, concerning all different aspects of the project.
- **Reviewing the identified risks:** every time a new risk is identified the risks table will be updated. On Managerial monthly meetings, participants will be asked if they have identified any risk or foreseeable risk. Risks will be monitored and controlled along the project's lifespan, especially the high severity risks.
- **Apply preventive and corrective measures:** in case any risk is materialized the corresponding corrective or preventive strategy defined will be implemented.

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Risk Management

The table below summarizes the identified risks, and details a response strategy for each of them. From the 6 identified risks, 2 of them are considered of high severity, 4 of medium severity and 0 of low severity, this categorization will determine the prioritization of the risk both in terms of controlling and monitoring and in response.

Table 29: Risk analysis and management

Risk Qualitative Analysis							Response Plan			
ID	Risk	Probability	Factor	Impact Factor	Severity		Name of the response	Description of the response	Strategy	Action
01	Limited financial opportunities existing on the market	60%	2	2	4	Medium	Reach other markets and financial sources	For implementing the project, it is intended to reach other financial opportunities, like European grants or private foundations mechanisms of supporting similar initiatives	Accept	Corrective
02	"Tiredness" of social workers (public authorities and NGOs)	50%	2	2	4	Medium	Financial stimulus and expand the network	While the workload is very high, social workers, once trained, have the potential to pass by the knowledge and just oversee the process. Also, within the training, they will receive a financial stimulus.	Mitigate	Preventive
03	Bureaucratization in the creation of a structure and supra-structure of energy advisors will leave little room of manoeuvre for making decisions and entering the most vulnerable communities	40%	2	2	4	Medium	Stakeholder engagement	Various actors will be engaged in the process of creating the networks of energy advisers. Having a strong grass-root component, each local network will have the capacity to adapt solutions based on the needs. Local networks will have a form of autonomy and will not be held to apply top-down measures.	Accept	Corrective
04	Lack of interest of the private sector	70%	3	2	6	High	Better pitch the model	Try to find the economic opportunities within this model and convince private operators to join the project. Addressing energy poverty brings long term financial benefits.	Accept	Corrective
05	Lack of public awareness and knowledge on energy poverty	50%	2	2	4	Medium	Strong communication	Develop strong communication materials to raise awareness regarding Energy Poverty	Accept	Corrective
06	If incentives are not attractive, trainees may look for other job opportunities.	50%	2	3	6	High	Attractive financial incentives for the Romanian context	Give financial incentives to each trainee who finishes the training.	Mitigate	Preventive

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Impact – Probability matrix

Through the use of the impact- probability matrix, it will be possible to identify the existing priority risks throughout the project through Severity, which is calculated by multiplying the corresponding probability and impacts defined for each identified risk. This matrix allows having a more visual image of the identified risks, making it easier to have a special focus on the high severity risks.

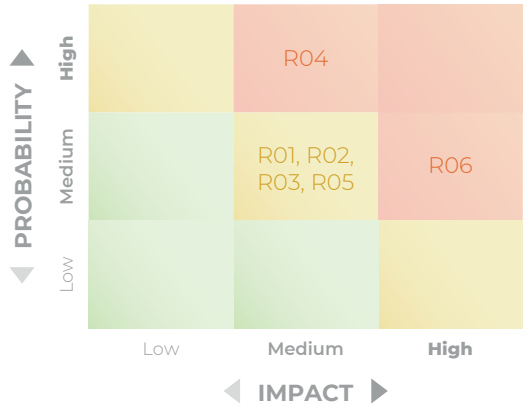

Figure 15:
Impact – Probability matrix

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POTENTIALITY OF BUILDING AN EU-NETWORK OF ENERGY AGENTS

Although it is out of the scope of SUITE, the consortium has explored the possibility of promoting a European Network of energy agents in order to provide an umbrella to national experiences. This section summarizes the scope of this preliminary analysis.

The ASSIST model multidisciplinary nature

European Network design

Other European realities the Network could connect with

Funding scheme and next steps

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The ASSIST model multidisciplinary nature

The multidisciplinary nature of the ASSIST- HEA model and its innovative approach allows members of the network (HEAs) to promote activities with a direct and immediate positive impact on the community by providing adequate support to vulnerable consumers. Moreover, the international background given by the ASSIST model, the character itself of the network and the willingness to participate in future to other European Projects clearly advocate for the creation of a European network of energy advisors. It is important to point out also that AISFOR and ECOSERVEIS, themselves, are currently involved in the Energy Poverty Advisory Hub (EPAH). The synergies arising among the institution and the European network are many and valid in different fields of action, from the research and dissemination of results to the support granted to municipalities and local institutions.

The creation of a **European network able to identify, connect and coordinate national networks** is therefore fundamental. Each national network will collaborate with different stakeholders coming from different realities and implementing different projects on the topic of energy poverty. In this view it is also important to bear in mind that the most effective initiatives tackling energy poverty are carried on at a local level, often by small voluntary association with a strong connection with the communities and therefore a model of governance able to identify, sustain and value these small projects is essential to **avoid an extreme fragmentation of the sector.**

Taking into account what has been said so far, the need for the creation of a European Network clearly emerges, fostering:

- Better sharing of best practices and increasing knowledge on energy poverty.
- Better monitoring of local initiatives.
- Easing the participation in European calls and international projects.
- Better participation with research bodies and institutions.
- Sharing intervention methodologies and learning from each other.

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European Network design

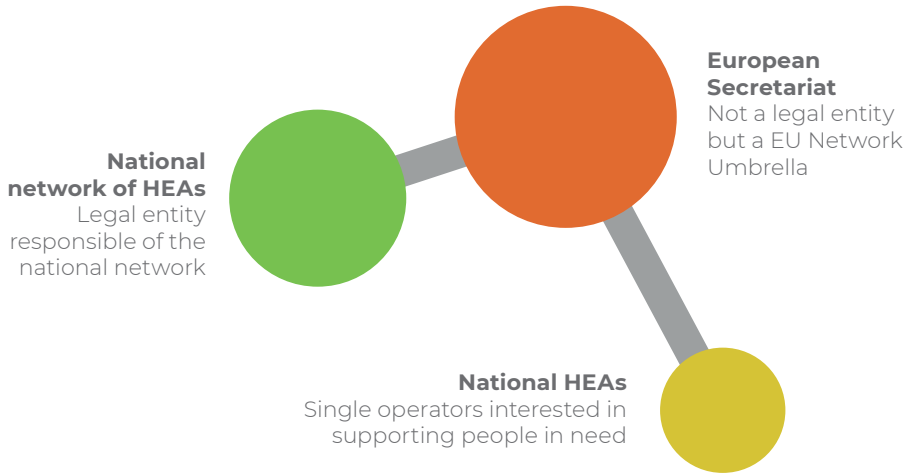

Figure 16:
The three-layered structure

As it is shown in Figure 16, the model will have a **three-layered structure.**

At the top, it will count with a **European Secretariat,** having not a legal entity, but rather an EU network, which will act as a European Umbrella. The secretariat will be in charge of:

1. Seeking for funding opportunities at European level (foundations, private sponsors, European projects, etc.) and helping members accessing to them.
2. Collecting national data and preparing an annual report.
3. Preparing European policy papers, and recommendations addressing the problem of Energy Poverty at any level.

The secretariat will be composed by AISFOR as leader and ECOSERVEIS as co-leader, together with a steering committee composed by all managers from the different National networks.

The second layer will be constituted by the **National networks,** coordinated by one organisation per country responsible for the National network (AISFOR for Italy; ECOSERVEIS for Spain, KAPE for Poland, and so on). The national networks will oversee to:

1. Engage National stakeholders in the ASSIST-HEA network.
2. Seek for funding at national level for the National network.
3. Prepare National policy papers and recommendations.
4. Prepare / update training and working resources for the HEAs.
5. Organise networking activities.
6. Support the HEAs in delivering advice and various actions.
7. Conduct the impact assessment and prepare annual reports.

The third, and last, layer of the model will be formed by the active **HEAs in the national territory,** a network composed by whoever is interested in learning more on energy poverty and actively contributing to support people in need. As a matter of fact, the HEAs are operators coming from different working contexts which carry out the ASSIST training course and, if successfully finished, become members of the ASSIST network. The fundamental role of the HEAs is to deliver advice and put in place actions on the ground to support people in need.

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Other European realities the Network could connect with

It is important to point out that the willingness to create a European Network takes into account the existence, in other member states, of other networks working in a similar way, and having similar scopes, with the European network here identified. As a matter of fact, the European network will include not only the national networks of the member states directly involved in the SUITE project (Italy, Spain, Poland, Romania, and Hungary), but also already existing realities in other Member States. Below is presented a brief analysis of the national networks already identified and suitable to join the network.

- The **Rappel Network in France** allows visitors to learn about energy poverty, its causes and consequences, to consult tools to help households in this situation and to contribute to improve knowledge and facilitates forums and other network tools to help people address energy poverty. Rappel is a national network accessible to all operators (social workers, researchers and private companies working in the energy sector) which provides courses and active communication through its website, a newsletter and a constant support system consisting of a mailing list and a call centre. The French network is funded by both public and private bodies and, among the already presented actions put in place, is also able to provide information and political recommendations.
- The **Energy cutters network in Belgium,** a network of energy scanners engaged in delivering one free energy scan per year to people according to the definition of energy poverty. The term energy scan refers to a home visit to check consumption habits and provide advice on how to be more efficient. The home visit aims also to provide support for switching to less costly subscriptions, support for the take up of the energy efficiency advice, information on the citizen's social and energy rights, the evaluation of the data collected during the energy scan, the check on energy consumption (in case of high consumptions) and a final check of the energy bill.
- The **Warm&Well in the United Kingdom,** the network managed by Severn Wye Energy Agency on behalf of the seven local authorities in South Gloucestershire and Gloucestershire, and the Gloucestershire County Council. Warm and Well offers energy efficiency advice to householders and also administers grant funding on behalf of the local authorities and other funders. The organization's advice line offers advice on several topics - from simple changes that can be made to save energy, grants for insulation or heating, switching energy supplier, to information on renewable technologies.
- The **Stromsparcheck in Germany** is a joint offer of the German Caritas Association and the Federal Association of Energy and Climate Protection Agencies in Germany & the Federal Association of Energy and Environmental Protection Agencies in Germany. It is funded by the Federal Ministry for the Environment, Nature Conservation and Nuclear Safety. The action of the initiative is based on the Electricity Saving Check, during which the team (formed by advisors who receive unemployment benefit and are trained with a 100-hour course) pays a visit at the agreed time and checks electricity

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consumption. During a second visit free aids (e.g., LED lamps, switchable socket strips, TV standby switches, timers and aerators for water taps) and an individual electricity-saving roadmap and qualified tips are given to the families. Moreover, families have the possibility to obtain a grant of 100 euros to replace old appliances to A+++ appliances.

The general vision on the European Network foresees the total integration of the above-mentioned realities within the network, allowing each national model to maintain its own peculiarities and distinguishing features. The basic assumption of this project consists of the idea that **national models should be tailored to the national background** to allow their success, **while the European secretariat will ensure a broader coordination,** the sharing of best practices and knowledge to enrich all the participants and eventually gather funds.

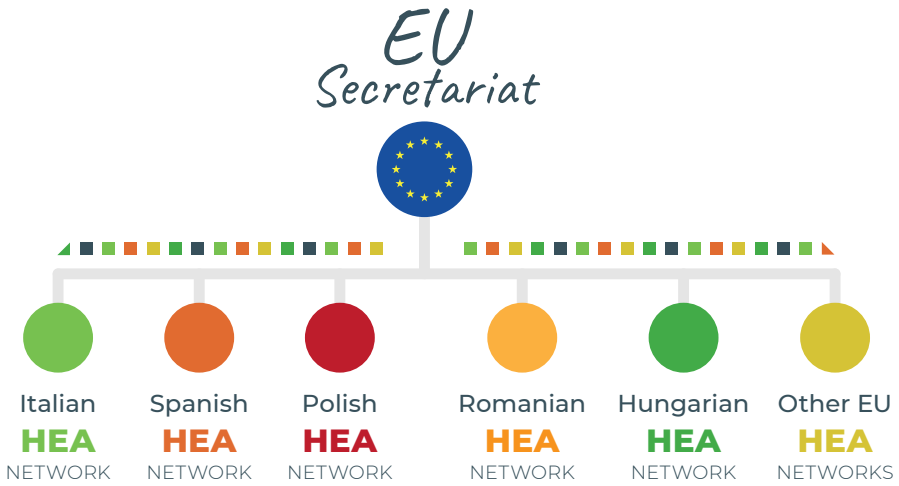

Figure 17:
Design of the European Network of National Networks

Funding scheme and next steps

The financial sustainability of both the national and European network undoubtedly remains the main obstacle to overcome. As it is shown in Figure 18, the model foresees a two-way vertical exchange of funds applicable in two steps:

- The **FIRST STEP** foresees the exchange of funds among the national network and the national HEAs. Each country will identify the best model to finance the national network (through public funds or private donations and contributions or mixed models).
- The **SECOND STEP** foresees the possibility to obtain direct funding for the European Network or, if a solid funding scheme is defined in the national networks, to create a scheme in which national networks donate quotas to the European network to support its work together with an eventual redistribution to national networks.

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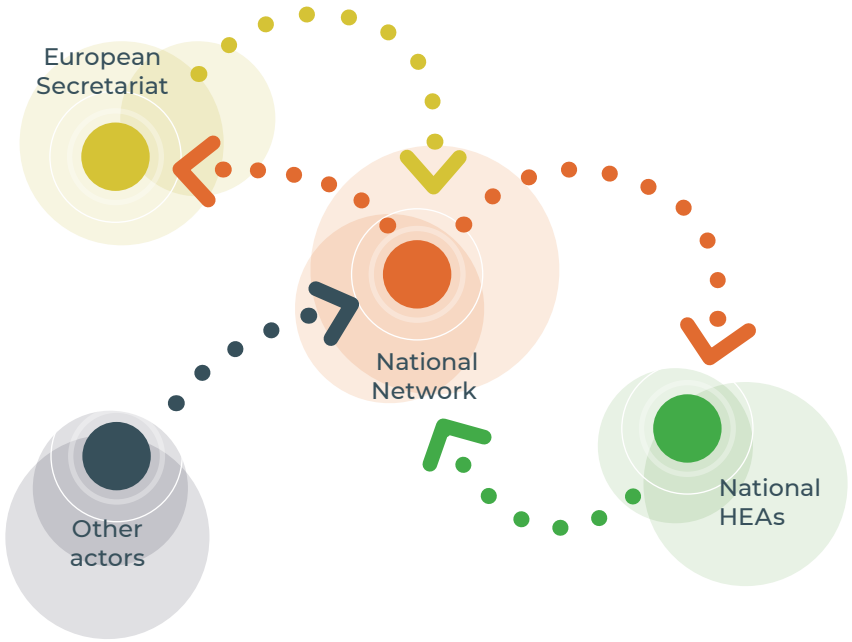
Figure 18:
Financial scheme



The gathered funds will sustain the network and the carrying out of all the activities foreseen. Moreover, the possibility to participate in European projects, tenders and similar initiatives should also provide financial support.

The creation of the European network is a complex process that will be implemented on a step-by-step approach.

- In the first place it will be necessary to implement and activate the national networks in the States directly involved in the SUITE project, a step that should be completed after September 2021.
- In the meantime, actions will be carried on quantifying the interest of European partners, a first round of interviews has already been completed and a further Focus Group has taken place in July.
- According to the results of the focus group and interviews working groups will be created with the interested parties, to co-create the European Network of energy advisors to tackle energy poverty.

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ANNEXES

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Annex 1

Table summarizing all pilots' objectives and key indicators

Characteristics	Hungary	Italy	Barcelona Region (Spain)	Małopolska Region (Poland)	Cluj-Napoca Region (Romania)
Scalability aim	Building a network	Two-legged model	Creation of an Energy Poverty Office	Scale the existing Network of HEAs	Building a network
Type of model	Public-private	Public-private	Public-private	Public	Public
Geographical coverage	National	National	Regional	Regional	Local
N° trained HEAs	50	70 - 100	100	75	30
N° of attended people	500 - 750	750 - 2.000	1.440	3.000	300
Public commitment level	Policy adaptation	Policy adaptation	Policy adaptation	Policy adaptation	Potential to involve with no financial commitments
Private commitment level	Financial and non-financial	Financial and non-financial	Financial and non-financial	Financial and non-financial	Potential to involve with no financial commitments
Estimated budget for the 2 years	127.125,00 EUR	241.000,00 EUR	187.228,00 EUR	161.400,00 EUR	155.000,00 EUR
Environmental and social indicators					
Reduction in energy consumption (kWh)	Not applicable	Not applicable	647.208	750.000	Not applicable
Reduction in CO_2 emissions (CO_2 tons)	Not applicable	Not applicable	135,91	675	Not applicable
Comfort level improvement	Not applicable	Medium - High	Medium - High	Medium	High
Increase operator's empowerment	High	High	High	Not applicable	Medium
Increase users' empowerment (i.e., decreased vulnerability to the energy market) (qualitative)	High	High	High	High	High
Public acceptance of the model (qualitative)	High	High	High	High	High
Social operators' satisfaction (qualitative)	High	High	High	High	High
Training material usefulness (qualitative)	High	High	High	High	High

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