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STEP-IN

D6.4 – Progress report on Stakeholder Network development

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Glossary

Abbreviation / acronym	Description
CSR	Corporate Social Responsibility
EEOS	Energy Efficiency Obligation Schemes
EEPI	European Energy Poverty Index
EU	European Union
EUSEW	European Sustainable Energy Week
GDPR	General Data Protection Regulation
GIS	Geographic information systems
NGO	Non-governmental organisation
NoI	Network of Interest
RES	Renewable energy sources
WG	Working Group

1. Executive Summary

This report presents an overview of the actions taken to establish a Network of Interest (NoI) shaped by stakeholder organisations and experts around Europe in order to acquire a broader understanding of the status of energy poverty in Europe and to allow STEP-IN to gain influence at a European level with a view to shaping national policies and strategies, which will be key to rolling out future schemes that reduce energy poverty during and beyond the end of the project.

The report is relevant for others wishing to develop a similar methodology to engage stakeholders through appropriate feedback mechanisms as well as to ensure stakeholder consultations are an integral part of policy recommendations based on project findings.



2. Introduction

The STEP-IN consortium implements a global methodology for analysing and tackling energy poverty through the establishment of three Living Labs in highly challenging locations with diverse characteristics across Europe, specifically a mountainous region in Greece, a rural area in Hungary and an urban area in the United Kingdom with low quality housing.

To allow the results of the Living Lab findings to be relevant in the post-project period, the STEP-IN consortium will provide specific policy recommendations. These will include the integration of insights drawn from the stakeholders shaping the STEP-IN Network of Interest as key inputs in order to develop an innovative global methodology for the effective analysis and tackling of energy poverty and to ensure long-term benefits for energy poor communities.

To achieve this, STEP-IN has so far engaged and will continue to engage stakeholders throughout the project period. In addition to the local stakeholders involved in the Living Lab areas, STEP-IN has engaged with interested parties across Europe, including industrial representatives, local and regional authorities, consumer and advocacy groups, practitioners, EU and national policy-makers, regulators, academia and think-tanks, in order to shape a motivated wider, pan-European Nol.

STEP-IN, therefore, mobilises a network of stakeholders at European level to establish effective, consistent and coherent interaction with all interested parties across Europe. The aim is twofold:

- To gain advice and insights from the stakeholders shaping the network, as well as to share immediate experiences and results from the Living Labs during the early stages of the project;
- To disseminate the results to the wider community through events and white papers as the project progresses and reaches completion.

This report contains an overview of the methodology concerning the engagement of the Nol as well as the steps taken so far. In particular, it outlines:

- The three phases of the STEP-IN Nol engagement strategy;
- The consultation and engagement plans for the creation and engagement of a motivated Nol;
- The tools utilised to mobilise the Nol;
- Work done up-to-date with regards to the first phase of stakeholder consultation.

Lastly, a conclusion summarises progress achieved so far.

3. Developing a Network of Interest – the STEP-IN approach

Establishing effective, consistent and coherent interaction with all interested parties across Europe requires careful planning and management to ensure the Nol members are committed to the project throughout its duration.

Stakeholder engagement coordinators VaasaETT contribute their experience in building and maintaining stakeholder communities. Simultaneously, project partners are invited to participate in this process by:

- Providing an initial list of contacts as potential members to the STEP-IN Nol and updating the list with new contacts throughout the project;
- Acting as initial points of contact between the STEP-IN consortium and potential Nol members;
- Participating in stakeholder consultation activities as Working Group (WG) leads.

This chapter provides a step-by-step presentation of the planned strategy for the development of the STEP-IN Nol.

3.1 Developing a stakeholder consultation plan

3.1.1 Identifying stakeholder roles

At the early stages of the project proposal the need to target specific types of stakeholders to shape the respective WGs in view of disseminating the project results to the wider community was identified. Based on the methodology and aims of the project, the involvement of the categories of stakeholders listed below (Figure 1) was found to be of crucial importance:

- Academia and think-tanks
- EU and national policymakers and regulators
- Local and regional authorities
- Industrial representatives
- Practitioners
- Consumer and advocacy groups



Figure 1: The STEP-IN NoI

3.1.2 Ensuring stakeholder engagement

The initial phase of the stakeholder engagement process included the selection of adequate communication tools to secure interaction among the STEP-IN consortium and the NoI, as well as the identification of feedback mechanisms to allow the STEP-IN consortium to make realistic and beneficial policy recommendations.

Selecting communication tools

The tools selected for effective communication among the consortium and the NoI members are:

- A newsletter issued ad hoc to share project news and call the NoI members to act;
- Communication via email for direct messaging;
- An online community platform which will serve the purpose of a workspace for exchange of information and materials (this will be further explained in the respective section below).

The NoI newsletter

The NoI newsletter constitutes the main tool for communicating with the NoI members. Mailchimp was selected as the marketing automation platform and an email marketing service as a popular platform offering the possibility of integration and being compliant with the General Data Protection Regulation (GDPR).

The STEP-IN NoI newsletter, shown below in Figure 2, includes:

- The project logo as header;
- An introduction serving as a welcome note or providing information on previous engagement activities;
- A section inviting the NoI members to take action (e.g. join online platforms, attend workshops or take part in surveys);
- A section dedicated to updates from the STEP-IN Living Labs to inform the stakeholders on progress reached in the field;

- A section with links to the STEP-IN social media accounts and website;
- A section with the European Union publicity disclaimer and acknowledgement reference to the project’s funding and grant agreement number;
- A footer including the subscriber’s preferences.



Figure 2: The 2nd STEP-IN Network of Interest newsletter

Direct messaging

Direct messaging via email is another frequent means to reach the Nol. It is often utilised to communicate with potential Nol members and invite them to join the network, or with members that joined but have not yet subscribed to the newsletter or the online community platform. Direct messaging offers the possibility to promptly reply to any requests or questions the Nol members might have.

The Online Community Platform

The Online Community Platform is established to ensure the continuous involvement of the Nol. As it constitutes a separate task within the dissemination and communication work package of STEP-IN, more information about it can be found in Chapter 3.4.

Selecting appropriate feedback mechanisms

The following feedback mechanisms were selected:

- Questionnaires in order to obtain feedback prior to stakeholder workshops, present preliminary findings during the workshops and trigger discussion;

- Stakeholder workshops as interactive sessions to ensure alignment and consolidation of the strategies and best practices found and exploited in the Living Labs and during the work of the NoI WGs;
- Other online consultations through teleconferences (e.g. Skype) or emails to obtain feedback from the stakeholders in case they are not able to attend workshops or as 'prior to workshop' feedback activities.

As of 18.06.2019, a questionnaire was shared with the NoI members in M10 (March 2019) as a pre-workshop activity. The findings of the survey were presented at the 1st STEP-IN NoI workshop held in Athens on May 29th, 2019 (M12). Detailed analyses of both the survey and the workshop are presented in chapter 4.

3.1.3 Assigning stakeholder engagement roles to project partners

Prior to NoI workshops or other engagement activities, project partners were assigned as WG leads. This role entails guiding the discussions with the members of the NoI participating as well providing consolidated feedback to the NoI engagement coordinators VaasaETT.

The selection of persons and leading partner was done based on the skillset and area of interest of the company, organisation or institution each partner represents. This resulted in the following allocation of leads per WG:

- Industrial representatives – Lead: E. ON (Istvan Hornyak)
- Local/Regional authorities – Lead: GMCA (Samuel Evans)
- Consumers and advocacy – Lead: ADICONSUM (Laura Galli)
- Practitioners – Lead: UMAN (Stefan Buzarovski)
- EU & National policymakers and regulators – Lead: RAE (Dionysios Papachristou)
- Academia & think tanks – Lead: LIST (Roderick Mc Call)

Prior to any engagement activity VaasaETT as coordinators of this process provides guidelines to the WG leads in order to ensure a feedback is obtained in line with the foreseen activity and the process is run smoothly.

3.2 Developing a stakeholder engagement plan

Defining an engagement strategy

The planned process to engage NoI members throughout the project period is summarised in Figure 3 below. Depending on project evolution and based on ad hoc needs and feedback from project partners, the plan can be subject to changes regarding the predefined dates, workshop methodology and preparatory work.

Figure 3 outlines the process, which consists of three NoI engagement phases. At the early project phase (M12) the aim is to shape collective descriptions of energy poverty in Europe and measures to tackle it based on collection of NoI feedback on key focus areas, targets, measures, requirements and problem descriptions. In addition, at this stage feedback is sought on project methodology and actions. At a later stage (M24) the focus will be on identifying concrete roles for relevant actors to co-design strategies for the effective tackling of energy poverty in Europe. In light of this, best practices regarding combating energy poverty will be discussed. As the project reaches completion (M30), key recommendations on how to tackle the phenomenon of energy poverty in Europe will be presented

at the STEP-IN final conference. These will be based on NoI consultations, but also on the findings of the Living Labs, experiences from relevant other European projects and results from own policy assessments.

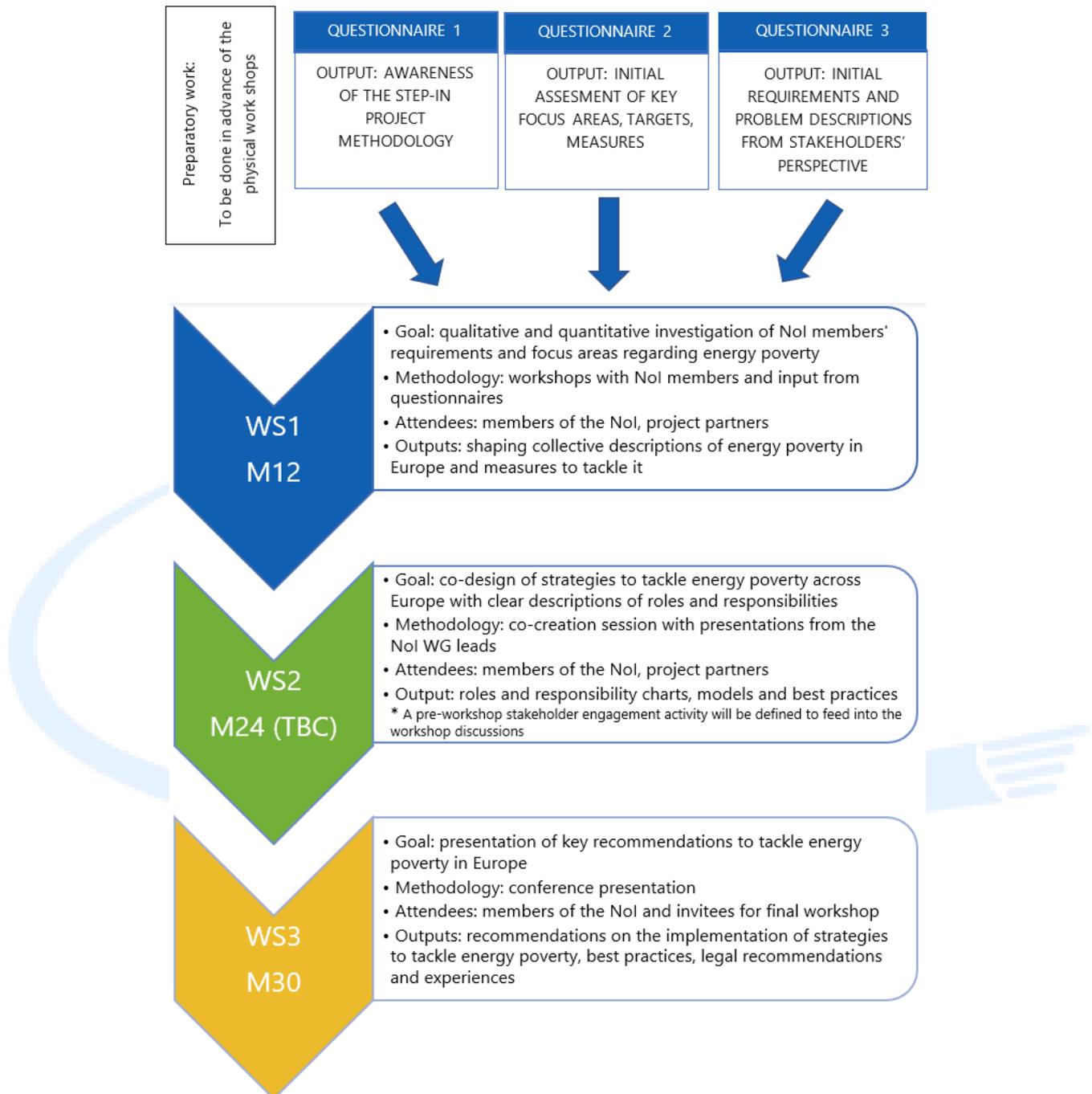


Figure 3: The STEP-IN Network of Interest engagement strategy

Managing an engagement plan

Following the consultation plan, the establishment of a cost-effective engagement plan involves:

- Maintenance of a list of stakeholders that shape the NoI;
- Member names, roles and contact details;
- Division in WGs in line with member profiles and areas of interest;
- Preferred methods of reaching out to the members;

- Mapping participation in Nol-related initiatives such as provision of inputs through questionnaires and participation in workshops.

Updating the engagement plan is an ongoing process that takes place throughout the full project duration. It is managed by the stakeholder engagement coordinators VaasaETT and requires collaboration with all project partners in order to identify and engage new members for the Nol and confirm the preferred method of reaching them. In addition, it constitutes a valuable tool for tracking all engagement activities per Nol member as well as per project partner, measuring the usability of Nol communication tools and feedback mechanisms and for providing recommendations on how to improve the engagement experience for the members of the Nol.

3.3 Establishing a stakeholder community

Identification of potential Nol members per partner

To set up the Nol, all partners were invited to contribute by engaging experts they listed as part of their networks. Contacts included in a list prepared during the proposal phase, some of which provided a support letter for this project, constituted a starting point for this process. Between M3 and M5 bilateral calls between VaasaETT and project partners resulted in identifying suitable contact points within the companies, organisations or institutions included in the Nol list, defining the best way to individually reach each contact and in allocating them to a WG in accordance with their area of interest.

Inviting potential members to join the Nol

As a next step, project partners disseminated invitation letters to identified stakeholders. As shown in Figure 4, as of 18.06.2019, the STEP-IN consortium has reached 77 potential stakeholders to shape a motivated Nol from various groups, including policymakers, industrial representatives, research institutions, local authorities, NGOs and lobby groups.

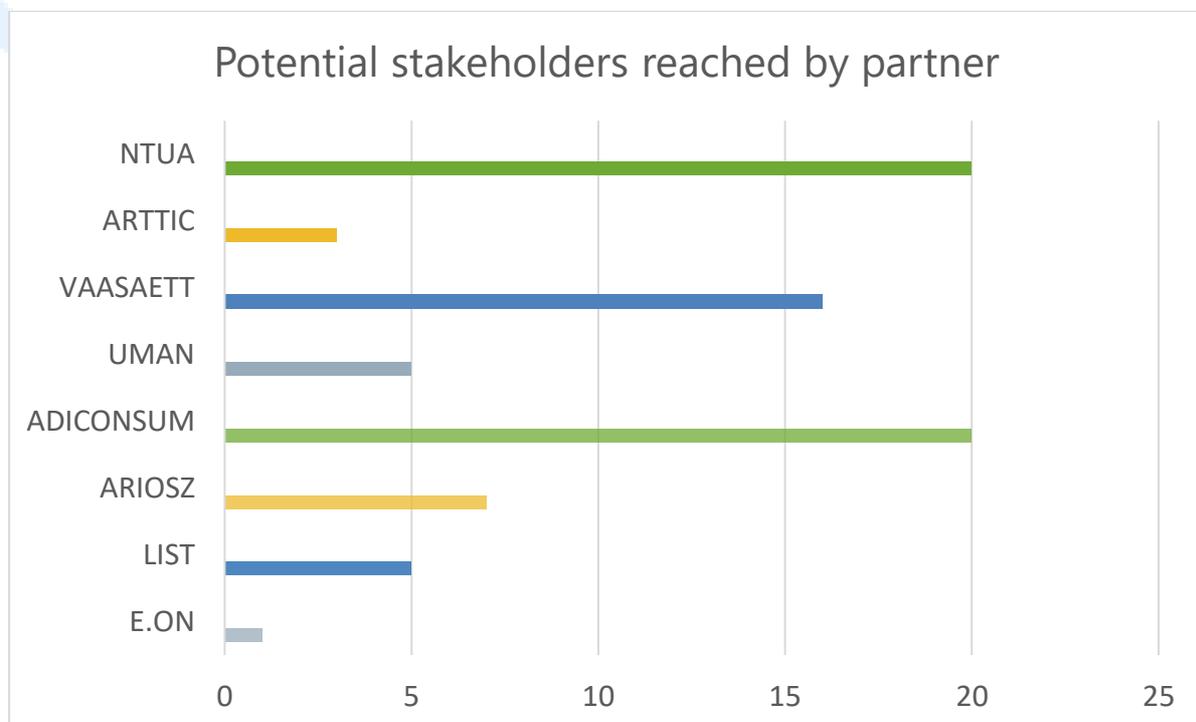


Figure 4: Potential stakeholders reached per partner (as of 18.06.2019)

This resulted in having 33 members confirming their participation to the Nol (status 18.06.2019) as shown in Figure 5. This task commenced in M5; however, it constitutes an activity that is relevant and can be repeated at any point throughout the project to increase the current network as well as to ensure additional feedback during forthcoming activities.

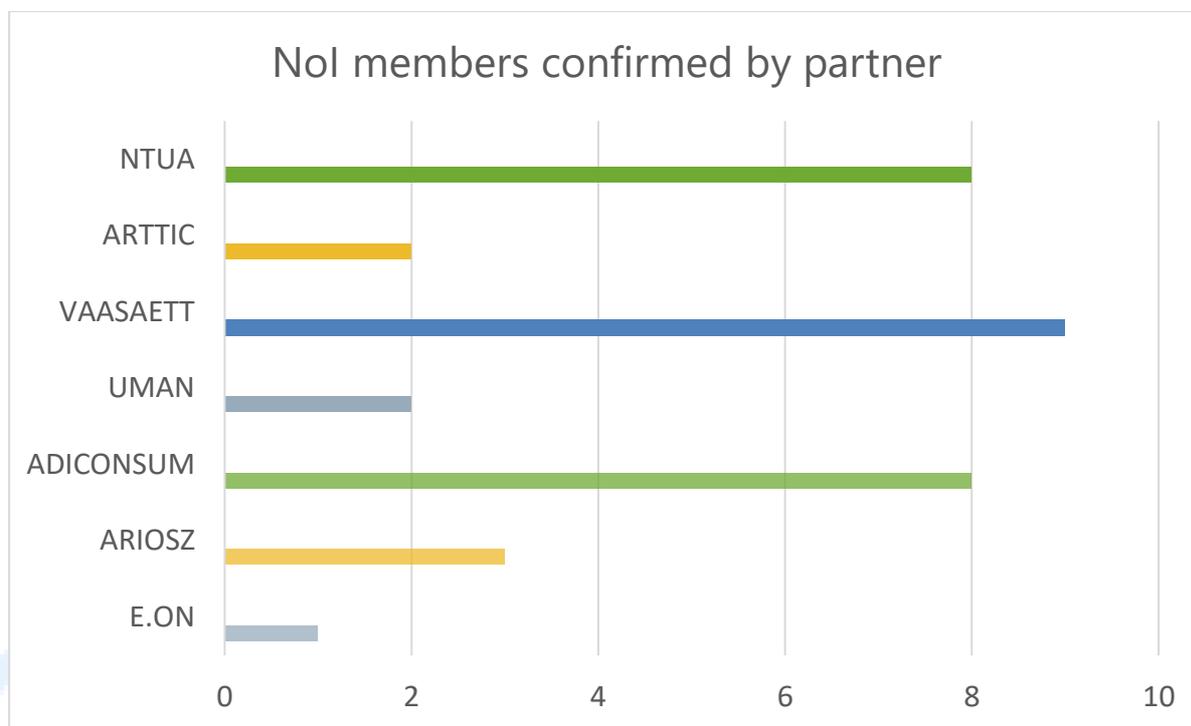


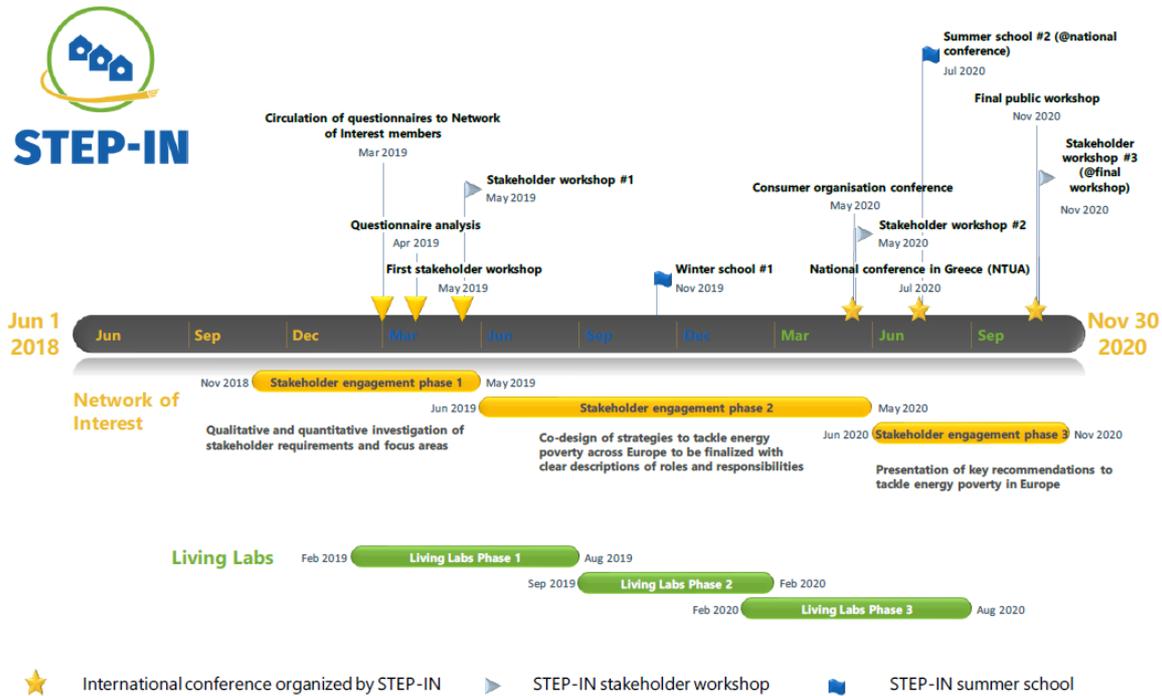
Figure 5: Nol members confirmed per partner (as of 18.06.2019)

3.4 Online Community Platform

To ensure the continuous involvement of the Nol an Online Community Platform was established. SharePoint was selected as a user-friendly platform. ARTTIC set up the platform in accordance with VaasaETT's plan in a structure that is very similar to Windows Explorer and allows drag-and-drop of files, enabling thus stakeholders to 'feel at ease' when working with the platform. The online Community Platform is a tool which aims to facilitate the Nol induction to STEP-IN, facilitate networking among its members, support the organisation, preparation and follow-up of physical workshops and ensure a place for sharing knowledge resources is available.

Furthermore, VaasaETT and ARTTIC developed material to support the smooth induction of the Nol members including:

- A STEP-IN one-pager with general information about the project;
- A Nol 'questions and answers sheet' with frequently asked questions regarding the project, the consortium, the Nol and its purpose, communication channels, means of participation in the network activities, benefits arising from participation and reimbursement policies;
- A project timeline (Figure 6) outlining stakeholder-related activities and the Living Labs phases;
- Guidelines for reimbursement of travel and accommodation expenses for the Nol members attending STEP-IN workshops;
- A PowerPoint presentation including all slides from the first STEP-IN Nol workshop.



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Figure 6: Timeline with STEP-IN activities relevant to the Nol

The Nol workspace (Figure 7) additionally includes a section dedicated to project resources, as well as a section dedicated to shared other resources, including energy poverty related material shared by the STEP-IN consortium that are not directly relevant to the project, as well as other energy poverty related material, such as policy papers and national strategies. These sections will be continuously updated throughout the project period to provide the Nol members with useful resources regarding energy poverty in Europe.

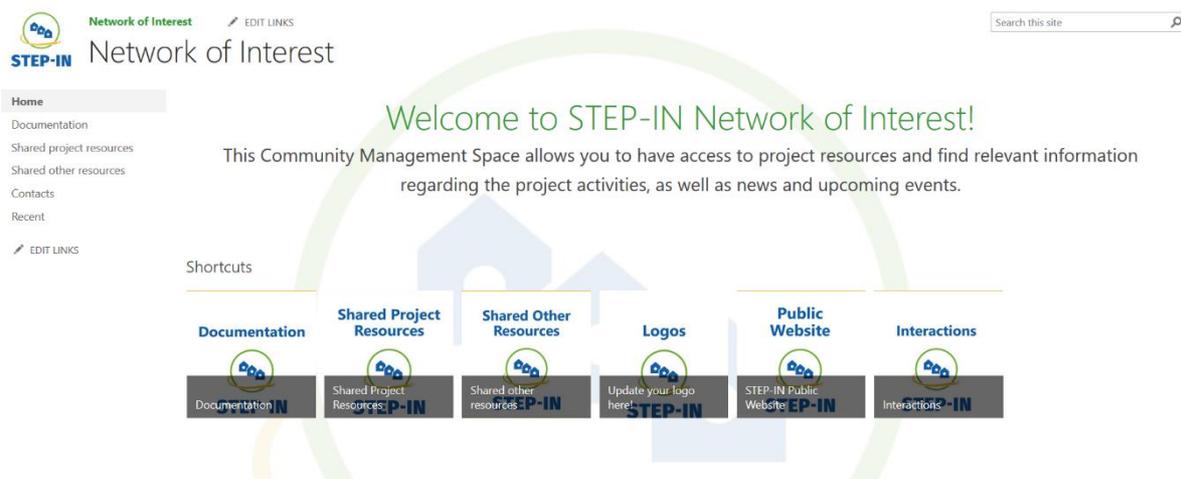


Figure 7: Nol workspace (SharePoint)

3.5 Formation and operation of Working Groups

The Nol members were divided in WGs in line with their area of interest. Each member can be allocated, based on needs of stakeholder engagement activities, in more than one WG.

The identified WG leads guide the discussions with the members of the Nol that confirmed their availability for the foreseen activity. Each WG lead is responsible for providing consolidated feedback to the Nol engagement coordinators VaasaETT. The participants and the division of Nol members confirmed as of 18.06.2019 in WGs are outlined below in Figure 8 and Table 1:

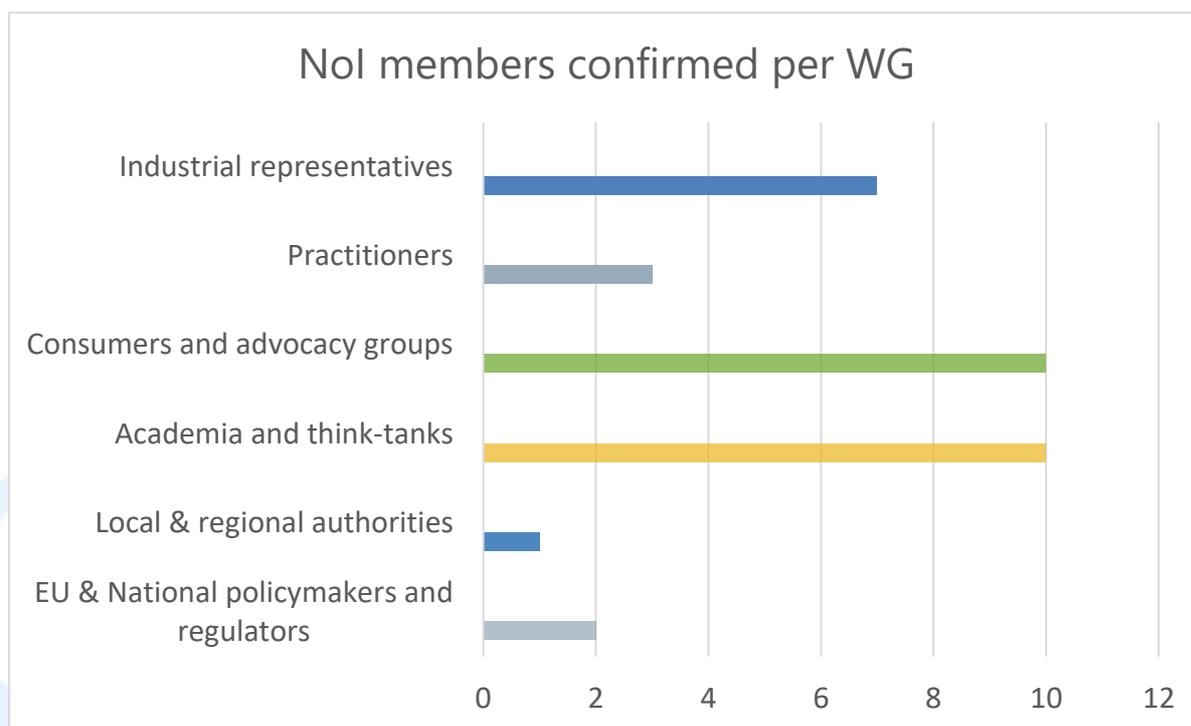


Figure 8: Number of Nol members per WG (as of 18.06.2019)

Industrial WG	Practitioners WG	EU & National policymakers and regulators WG
PPC	AISFOR	GREEK OMBUDSMAN
EDF R&D	MOTIVA OY	EESC EXPERT II
ESCAN	THERMOPOLIS OY	
ENI GROUP		
APPLIA EUROPE		
CEZ HUNGARY		
TIGÁZ		

Local and regional authorities WG	Academia and think tanks WG	Consumer and advocacy groups WG
CLIMATE ALLIANCE	IZEB	PINDOS PERIVALLONTIKI
	NATIONAL AND CAPODISTRIAN UNIVERSITY OF ATHENS	EKPIZO
	UNIVERSITY OF WEST ATTICA	ATD QUART MONDE
	INSITUTE FOR STRUCTURAL RESEARCH	DOOR
	WUPPERTAL INSTITUT	CEIP
	UNIVERSITY OF EXETER	KEPKA
	UNIVERSITY OF WARWICK	NEA
	RSE	AGE PLATFORM
	HUNGARIAN ACADEMY OF SCIENCE	ECOSERVEIS
	REKK	EESC EXPERT I

Table 1: Nol members confirmed per WG (as of 18.06.2019)

3.6 Policy assessment and recommendations

The involvement of the Nol members in STEP-IN engagement activities is twofold. At the early stages of the project, the STEP-IN consortium gains advice and insights from the Nol and shares immediate experiences and results from the Living Labs. As the project progresses and reaches completion, this bi-directional communication will continue with the aim of co-designing strategies and policy recommendations and disseminating the results to the wider community via events and white papers. The outcome of stakeholder consultations together with Living Lab findings, as well as experiences from European projects will feed into the policy assessment and recommendations included in the white papers. Results from own policy assessments, relevant measures found in literature and newly developed concepts, looking at renewable energy sources (RES) and refurbishment schemes, as well as examining the rebound effects which arise in the Living Labs and wider energy poverty field will also provide content for the white papers.

At this stage it is too early to provide specific policy recommendations. So far on this aspect the focus has been on looking at best practice across Europe, in particular from existing energy poverty and refurbishment projects.

4. 1st phase of STEP-IN stakeholder engagement

4.1 Pre-workshop engagement activities – the questionnaire

Activities with reference to the 1st phase of stakeholder engagement was initiated following the definition of WGs and the confirmation of an adequate number of Nol members. In line with the strategy presented in chapter 3.2, in M9 a questionnaire was developed to obtain preliminary feedback from the Nol members.

Aim and engagement rate

The questionnaire was disseminated in M10. The aim was to shape collective descriptions of energy poverty in Europe and measures to tackle it. Survey findings and key conclusions were planned to be discussed during the 1st STEP-IN Nol workshop in Athens. Divided in three parts, the questionnaire:

- Assessed the respondents' awareness as a company, organisation or individual in relation to the methodology STEP-IN implements, in particular knowledge of Living Labs as ways to examine and address energy poverty, and usage of forms of urban or rural experimentation, or of IT solutions to address the phenomenon;
- Collected respondents' considerations in relation to what is obtainable with regards to focus areas, targets and measures in order to understand which key areas require attention;
- Filtered the respondents' considerations in relation to what is needed to tackle energy poverty in relation to resources and initiatives.

A total of 11 respondents out of 29 Nol members (number of Nol members at the end of submission of replies on 20.05.2019) brings the engagement rate with reference to this activity to 38%.

Questionnaire analysis

Participants' profiles and areas of interest

As shown in Figure 9 below, a wide range of interested parties replied to the questionnaire, including NGOs, academia, Brussels-based lobby groups or associations, policymakers, research companies and consultancies. Feedback provided was either at EU-level or focusing on specific countries, namely Greece, United Kingdom, Italy, Spain and Croatia.

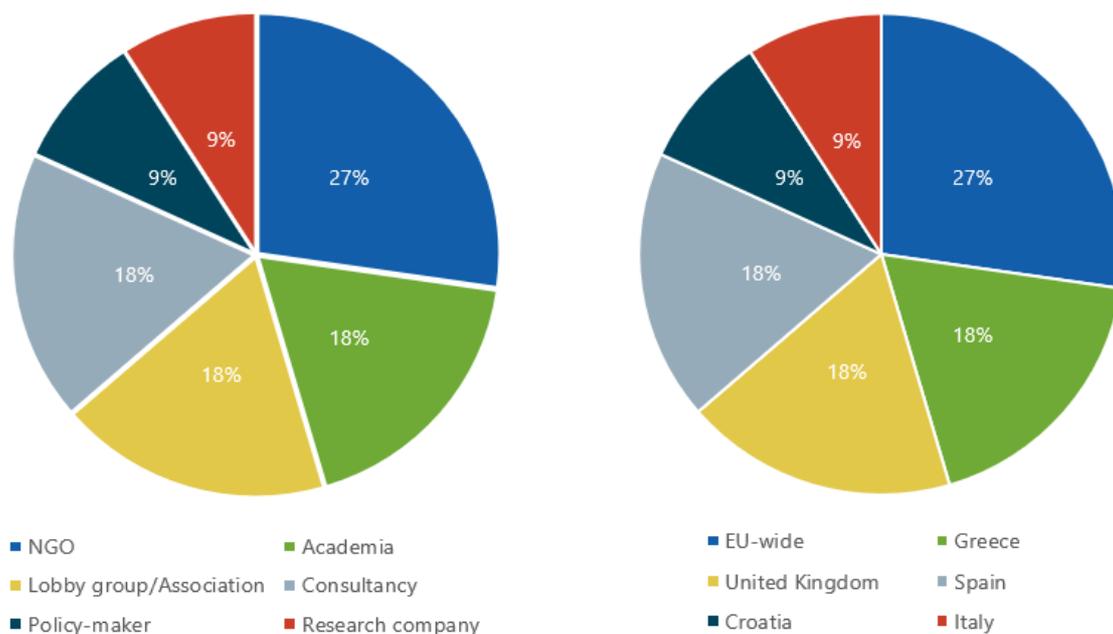


Figure 9: Nol questionnaire participants' profiles and areas of interest

Part 1: Awareness of project methodology

Understanding Living Labs as a methodology to examine and address energy poverty

More than half (55%) of the respondents replied that they understand the Living Lab methodology, 27% had no knowledge of it, and 18% had very limited knowledge about it. Among those who had a good understanding of the methodology, quotes provided such as "Living Labs are a social experiment in which local stakeholders are trained in how to handle energy (domestic) issues", "a useful methodology to assess real persons' needs in real situations", "a sort of Participatory Action Research - working in defined communities" and "an interesting methodology [...] with main challenges to involve a significant number of people [...] for the whole Living Lab duration, to involve people [...] to describe the obstacles they face in improving comfort and living conditions or saving money on energy bills" are in line with the work done in the three STEP-IN Living Lab areas.

Using forms of urban or rural experimentation to address energy poverty

More than half (55%) of the respondents implement or have implemented any form of urban or rural experimentation in order to tackle the phenomenon. Urban or rural experimentation activities in which respondents are involved include:

- Implementing low cost energy efficiency measures to help households in tackling energy poverty in a series of pilot projects;
- Collecting data from vulnerable families at municipality level;
- Cooperation in projects related to smart metering and consumers, including vulnerable ones.

Using IT solutions to address energy poverty

More than half (55%) of the respondents implement IT solutions to tackle the phenomenon. IT solutions utilised concern:

- Use of online tools and development of IT tools in projects aiming to educate and share knowledge about energy poverty;
- Online energy poverty calculators, internal systems not available for the public and IT tools part of product trials;

- Excel sheets for data gathering and GIS (Geographic information systems) for spatial allocation of households;
- Online platforms or apps to support the use of smart metering related tools and devices.

Part 2: Initial assessment of stakeholders' key focus areas, targets, and measures

Stakeholders' primary area of work or interest in relation to energy poverty

Respondents are involved in policy and/or advocacy work (45%), research, including testing solutions in the field (27%), provision of consulting services, including strategic planning and interventions (18%), and awareness raising campaigns (9%), while a small percentage (9%) is not directly involved at the moment in work related to energy poverty.

With regards to their interest in working in the field, 45% replied they wish to ensure clean, affordable energy is available for all, with a particular focus on vulnerable groups, while 27% aspire to reduce energy poverty through increasing energy efficiency in buildings or appliances.

Working with concrete targets in relation to work concerning energy poverty

Absence of concrete targets in work related to energy poverty is reported in most cases (64%). Absence relates to lack of funds, lack of well-established networks with expertise in this domain, or the research or work focus not being related to targets.

When working with targets (36%), these are set annually, are part of individual project aims and KPIs or concern work in residential areas, in particular at municipal or national level (100 households, 5% of which are vulnerable in a case reported in Greece or at residential houses in Italy at national level).

Defining and measuring energy poverty

Interesting quotes were provided by the survey respondents regarding the definition of energy poverty. In particular, "an appropriate definition is given by the EU Energy Poverty Observatory; specific indicators are needed to match national situations country by country to prevent the risk of underestimating energy poverty", and "there is a need to recognise the role of energy poverty in limiting people's capacities for social participation and living healthy lives" (EU Energy Poverty Observatory, 2019). "This requires a broader focus beyond energy affordability [...] to encompass energy services, such as digital access and access to personal transport".

With reference to measuring energy poverty, it was lamented that "used standards should be adapted to specific needs and situations of older persons. This is not the case today everywhere". In addition, the "10% criterion of energy spending compared to the income", "objective measurements, like the percentage of income allocated for heating purposes and other subjective measurements such as the perceived discomfort related to the house heating" were reported as existing ways to measure energy poverty.

Knowledge of people considered energy poor in the area of interest

Interestingly, 40% of the respondents were unable to provide concrete figures when it comes to the percentage of energy poor people in their area. According to the Nol members, energy poverty is exceeding 40% in the case of Croatia, reaching approximately 16% in Italy, while in the case of Spain figures provided range between 10% and 15%.

Focus on tackling energy poverty in the area of interest

Half of the respondents confirmed that there are national, regional or local policies currently implemented in their areas of interest, while others (20%) mentioned that little is done, or social welfare programmes implemented are largely inadequate. A 10% reported energy poverty related academic work conducted in the field, while a 20% was not able to provide details.

Looking at the issue at a national level, in Greece, a national plan for Energy and Climate is existing but actions or potential funding just started, while in Spain national, regional or local policies target problem identification and defining solutions. Most of them are related to economic support (public) to pay bills or include specific tariffs for low income families. Lastly, in the United Kingdom, a wide range of energy research projects often encompass fuel poverty focus, primarily looked into by those working within energy, rather than those addressing poverty. Different organisations do cross over and make referrals, but the system is not set up to address energy poverty as part of the wider issue of poverty. Funding and help are available separately for different issues, with energy being one of them.

Key issues causing energy poverty in the areas of interest

Low energy efficient buildings or appliances were identified by 60% of the respondents as an issue. Multiple socio-economic factors followed as listed key matters (high or rising energy prices, including for first used energy units by 50%, low income, loss of purchasing power and expensive energy saving solutions by 40%, austerity and in particular cuts in social welfare by 30%, and high unemployment by 30%). Lastly, in the case of the United Kingdom lack of recognition of energy poverty related issues such as self-disconnection and underuse of energy was reported.

Part 3: Initial assessment of stakeholders' requirements and problem descriptions

Stakeholders' funding resources for energy poverty related work

Funding sources for the survey respondents vary. EU and national funds were reported by 36% of them, while a 27% works with funds from local or regional sources. More than a quarter (27%) of the respondents do not receive funds for energy poverty related work. The Rights, Equality and Citizenship programme (EU level), the Engineering and Physical Sciences Research Council, and the United Kingdom Research and Innovation (National level) were cited as donors.

Main requirements to efficiently start tackling energy poverty in the areas of interest

The STEP-IN stakeholders were asked what is needed to efficiently tackle energy poverty in the areas of concern; findings are grouped in two main categories in Table 2 below.

Policy-oriented requirements	Research or field-oriented requirements
Political commitment	Holistic plans and well-defined processes (focus, measures, available funds, measuring effectiveness)
Focus on implementing long-term measures	Fast adoption methodology for supporting schemes
Need for governments to focus on domestic energy efficiency as the most enduring solution to achieve collective goals	More field work (researchers and NGOs)
Prioritising the issue	Organised data on vulnerable consumers
Defining legislative measures for the energy poor	Well-documented pilot cases for replication

Addressing socio-economic factors (setting minimum standards for adequately warm houses, lower energy prices, expanding the scope of social benefits beneficiaries)	Rationalisation: better collaboration of active organisations and easier to understand system to non-professionals, enabling active professionals to identify energy poor
	Informational campaigns for local stakeholders
	Citizen engagement
	Collaboration with local actors (NGOs, social services)
	Proper communication/avoiding stigmatisation

Table 2: Nol views on requirements to efficiently tackle energy poverty in the areas of interest

Status of helping people out of energy poverty

Progress in helping people out of energy poverty is reported by 36% of the respondents. A 27% finds that limited effort is spent, while others find that progress is varying across the EU (9%). Stagnation (9%) and lack of information to prompt energy behaviour (9%) are also reported.

In the case of Greece, progress reached involves citizens providing data regarding their condition and status of home energy performance. However, better information can lead to adjust their "energy behaviour" by exploiting some institutionalised benefits, such as social tariffs. In the case of the United Kingdom, although tackling fuel poverty is fairly advanced in terms of policy and practice, results to multiple actions taken have been hindered by long-term austerity, fruitless new definitions of energy poverty and reliance on energy companies to deliver policy aims.

Stakeholders' strategy going forward to tackle energy poverty more efficiently

According to the respondents, elements of an effective strategy to go ahead with tackling energy poverty include: a focus on energy efficiency improvements available to those in need; successful pilot implementation and exchange of best practices and experiences for replication; building networks among interested parties to define strategies; ensuring the legislative tools to tackle the phenomenon are available; in-depth looking at the roots of the phenomenon rather than implementing quick solutions; agreeing with companies on Corporate Social Responsibility (CSR) initiatives that mitigate energy poverty; finding resources to give continuity to successful work undertaken; ensuring schemes with demonstrable success are rolled out widely; and the need for coordinated lobbying efforts in favour of the energy poor.

Important issues to handle in the short and long term

Lastly, stakeholders were asked to set short-term and long-term priorities on issues to handle. Table 3 below provides a summary of the respondents' recommendations.

Issues to handle in the short term	Issues to handle in the long term
Availability of funds and solutions for the affected ones	Measurable statistics definitions to help expand policy criteria
Prioritise those affected the most as criterion for allocated funds	Well-tested available funding schemes
Adequate information to those in need	Improve building standards, promote passive buildings

Identify needs and preparing legislative tools to tackle them	Actions and follow up on adopted legislation
Ensure minimum cooking, heating and lighting for all through social tariffs	Boost the uptake of energy saving technologies
Data collection for vulnerable households	Progressively funded national area-based programs
Enhance preventative health action	Carry out observatories and data collection on energy poverty related indicators
Enhance cross-nation cooperation	Interconnection between policy areas and issues

Table 3: Nol views on important issues to handle in the short and long term

Key conclusions

The survey generated interesting insights with the aim to shape collective descriptions of energy poverty in Europe and measures to tackle it. Memorable findings that were planned to be shared at the 1st STEP-IN Nol workshop to trigger discussion with participants are listed below:

- **Increasing energy efficiency in buildings and appliances** is a key issue to deal with in order to tackle energy poverty; **socio-economic factors (energy prices, low income, cuts in social welfare)** are reported in most cases; interestingly, **lack of recognition of energy poverty** related to self-disconnection and energy underuse is also reported
- **Working without concrete targets to combat energy poverty** is often the case; lack of funds or networks with expertise on the domain were identified as reasons
- **Energy poverty definitions** need to include country-specific indicators and go beyond energy affordability to encompass energy services (digital access and access to transport)
- **Measuring energy poverty** should be adapted to specific needs and situations of vulnerable groups, as it is not the case everywhere in the EU
- **National, regional or local policies to combat energy poverty are reported in most cases;** however, difficulties are encountered: in certain cases, implementation commenced only recently; there is lack of a system to address energy poverty as part of the wider issue of poverty; social welfare programmes are being inadequate
- **Adjusting energy behaviour of vulnerable consumers** can be achieved if citizens are better informed
- Further to policy and research/field-oriented solutions proposed, the corporate world can be involved in **mitigating energy poverty through CSR initiatives**

4.2 The 1st STEP-IN Nol workshop

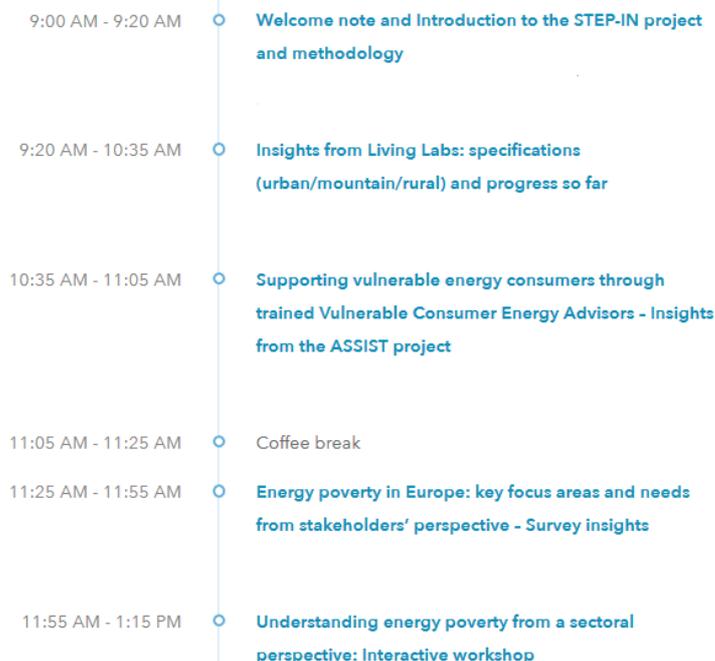
To conclude the first phase of stakeholder involvement in accordance with the engagement strategy, the STEP-IN consortium held the 1st STEP-IN Nol workshop in Athens on May 29th 2019 at the premises of project partners RAE as part of the project General Assembly. The workshop has been accepted by the European Sustainable Energy Week (EUSEW) – the biggest event dedicated to efficient energy use in Europe – as an official Energy Day event. It brought together more than 35 participants, among which 9 were members of the STEP-IN Nol and 3 local stakeholders. The workshop programme (Figure 10) provided the attendees with the opportunity to:

- Get insights from the work done in the STEP-IN project Living Labs;
- Get the broader picture of targeted efforts to reduce energy poverty in Europe;
- Discuss energy poverty definition issues, assessments of the current situation and proposed solutions with the STEP-IN Consortium partners and experts shaping our Network of Interest.



STEP-IN GA Meeting and Network of Inter...

May 29 - 31 2019 · RAE



9:00 AM - 9:20 AM	Welcome note and Introduction to the STEP-IN project and methodology
9:20 AM - 10:35 AM	Insights from Living Labs: specifications (urban/mountain/rural) and progress so far
10:35 AM - 11:05 AM	Supporting vulnerable energy consumers through trained Vulnerable Consumer Energy Advisors - Insights from the ASSIST project
11:05 AM - 11:25 AM	Coffee break
11:25 AM - 11:55 AM	Energy poverty in Europe: key focus areas and needs from stakeholders' perspective - Survey insights
11:55 AM - 1:15 PM	Understanding energy poverty from a sectoral perspective: Interactive workshop

Figure 10: The 1st STEP-IN Nol workshop programme

Introduction

Rod McCall (LIST), STEP-IN project coordinator highlighted the relevance of research and coordination on energy poverty across Europe, and presented the sustainable outputs of the methodology of the STEP-IN project which applies the concept of Living Labs to energy poverty and “really is about solving problems for energy consumers” in the workshop opening remarks.

Insights from the STEP-IN Living Labs

Following this, Stefan Bouzarovski (UMAN), Dimitris Damigos (NTUA) and Zoltan Kmetty (ARIOSZ) provided insights from work done so far in the three Living Lab areas of the STEP-IN project, namely the Greater Manchester urban area in the United Kingdom, the mountainous area of Metsovo in Greece and the rural area of the Nyírbátor District in Hungary. The Living Lab leads focused on energy poverty rates and unique challenges posed in the areas of interest and presented key achievements of the first year of implementation of STEP-IN.

“Defining energy poverty is really hard and delicate because in the end it is a political term” said Stefan Bouzarovski and added: “trust and use of technologies and facilities beyond individualised consumer behaviour measures are a central challenge to many households. The benefits from the advisor visits are very clear”.

Dimitris Damigos explained: “Mountain communities face some particular challenges relating to the harsh climate conditions, the relatively old building stock, the increased fuel costs and the lower incomes”.

"An average household spends 18% of their income to cover energy expenses. The goals of our Hungarian Living Lab are multiple, including helping consumers to have safe and legal access to energy, improving energy literacy, improving comfort levels and reducing environmental impacts. More energy cafés are coming up, focusing on specific target groups", Zoltan Kmetty said.

Insights from the ASSIST project

STEP-IN aims to liaise with existing connections with other relevant projects and networks tackling energy poverty to exchange information and share best practices and finally contribute to the creation of a critical mass on the energy poverty issue.

In light of establishing synergies, Marina Varvesi of AISFOR, coordinator of the Horizon2020 funded project ASSIST, a European market activation and policy orientation initiative to tackle fuel poverty and support vulnerable consumers, was invited to present ASSIST to the workshop. Marina explained that "Energy poverty is different in each European country. Some initiatives to tackle the issue are at EU level, some at local level which often is more relevant and interesting in terms of replicability".

Presentation of the 1st Nol survey

The next session was dedicated to the presentation of the pre-workshop survey findings as an attempt to shape collective descriptions of energy poverty in Europe and measures to tackle it.

The outcomes presented by Konstantinos Kanellos (VaasaETT) concerned an initial assessment of the survey respondents' knowledge of the project methodology, as well as key focus areas, targets, measures, requirements and project descriptions regarding energy poverty across Europe, as analysed in chapter 4.1 of this report. Konstantinos pointed out that "in-depth looking at the roots of the phenomenon rather than implementing quick solutions is key in going forward to tackle energy poverty according to the stakeholders".

Understanding energy poverty in Europe from a sectoral perspective – workshop interactive session

The interactive session of the workshop aimed to trigger discussions among specialists in order to conclude on what shapes energy poverty across the EU and what should be done next. In accordance with the stakeholder engagement methodology the project implements, participants were divided in WGs led by a project partner to discuss energy poverty definitions issues, assess the current situation, propose solutions and provide feedback on the project methodology and actions. Feedback from the Local and regional authorities WG was obtained separately through an online consultation as it was not possible for relevant stakeholders to be physically present at the workshop. Figure 11 below outlines the WG division.

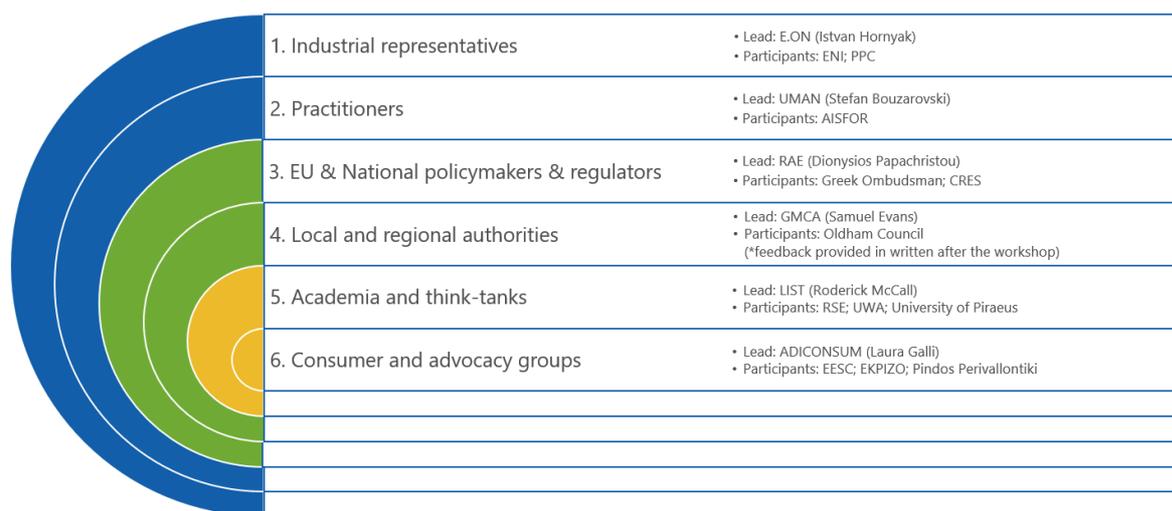


Figure 11: The 1st STEP-IN Nol workshop WGs

Defining energy poverty

The *Industrial representatives WG* found no exact definition of energy poverty in Hungary, Italy and Greece. An issue identified by the group is that in energy poverty related discussions, the focus is on socio-economic factors but the utilities' specifications (e.g. amount of debt, age of debt, number of disconnections etc.) are often not considered. According to the WG's opinion, a definition should exist on energy poverty (consumption, debt in focus) and general poverty (income in focus). On vulnerable consumers, in Hungary the Law of customer's protection defines "protected customers". Utilities have responsibilities here, but the issue is that since many of these customers do not register into the database, utilities cannot help. In Greece and Italy, such databases do not exist. GDPR is also an issue, i.e. how to record customers into the company's database if they do not register.

Regarding factors for monitoring and measuring energy poverty, the WG believes that not only socio-economic factors should be considered; utility specific factors (i.e. debts, age of debts) should be taken into account. Governments are responsible for the definition of energy poverty.

According to the *Practitioners WG*, definitions vary a lot from country to country and range from formal to informal; in most countries there is an informal definition. A common point of definition is energy needs being met with satisfaction. The workshop done within ASSIST on the energy poverty definition showed that the only common point of formal and informal definitions was the poverty vs. energy related aspects, i.e. people who for economic reasons are not able to satisfy their energy needs. On meeting minimum requirements, it is reported that energy needs are different across Europe.

To monitor and measure energy poverty, consumption is a criterion (to define a minimum level of energy consumption per person, based on real energy data and standardising it according to main parameters such as dimension of the household, number of people living in the house, etc., then the minimum amount of energy per person that must be guaranteed can be defined). In addition, comfort level, income and, lastly, take into account the different groups, as factors are not the same for all.

The *EU & National Policymakers and regulators WG* explained that, while there is no official definition in the case of Greece, it is foreseen that the definition will be decided within the framework of the National Action Plan for combating of energy poverty. An officially established Committee will compile and monitor the Action Plan. There is, on the other hand a definition available for vulnerable consumers.

To monitor and measure energy poverty, the capability to fulfil the minimum required energy needs, a Vulnerability Index so as to identify the energy poor households for the design of the required policymakers, as well as socioeconomic factors should be examined carefully.

The *Local and Regional authorities WG* explained that, according to the UK Government's definition of fuel poverty, a household is considered to be fuel poor if they have required fuel costs that are above average (the national median level); and were they to spend that amount, they would be left with a residual income below the official poverty line. In addition, under the Greater Manchester Energy Company Obligation Local Authority Flexible Eligibility Statement of Intent, consumers are classed as vulnerable if their household annual disposable income (after deducting tax, mortgage / rent and Council Tax) is below determined thresholds and a member of the household has one of the listed vulnerabilities to the cold (Greater Manchester Combined Authority, 2019).

The WG sees three important elements in determining whether a household is fuel poor: household income; household energy requirements (which can be determined by the Energy Performance Certificate rating for the property); and fuel prices.

The *Academia and think-tanks WG* said that issues with energy efficiency, income threshold, comfort level being subjective, sometimes set to general poverty level (e.g. Italy, France) are the main reasons for not having an agreed definition. The EEPI (European Energy Poverty Index) is cited as setting respective transportation and mobility indicators (The European Portal For Energy Efficiency in Buildings, 2019).

To effectively monitor and measure energy poverty, criteria should be humidity, temperature, pressure, air quality, regarding comfort; consumption (source type, quantity) as well as fulfilling the needs of the actual demand profile of the vulnerable persons, regarding expenses; income (residual after bill percentage, applying the 10% rule); and location of residence, since environmental conditions (rural, mountain, urban) have impact on the bill.

The *Consumers and advocacy WG* agreed with the definition adopted by the EU Energy Poverty Observatory being correct, however it feels the definition remains at a general level. There is the need for a concrete definition of energy poverty, in terms of a set of indicators shared and agreed throughout Europe, to be aligned to national situations: climate conditions, energy sources' accessibility, prices, taxation etc. A common reference basis and additional specific criteria are needed to allow a proper assessment of energy poverty across the EU; this would result in a benchmarking methodology to be applied by national statistics institutes and sector institutions. Energy poverty is the result of a combination of influencing factors, as vulnerable groups are not only low-income households, but also, for example, low schooling, people exposed to unfair commercial practices and contracts, higher prices, difficulty to access energy saving and efficiency technologies, low access to ICT. They have to face many barriers to the uptake of energy efficiency technologies.

On factors for monitoring and measuring the phenomenon, the income, but also the family size, which influences the consumption levels and is relevant whenever progressive tariffs apply, the age, the social and cultural conditions, and over-indebtedness should not be overlooked. In addition, the climate conditions, which determine a minimum energy requirement to ensure healthy living conditions, the available energy sources, and the average building technologies with related thermal efficiency should be considered.

Assessment of the current situation regarding energy poverty

The *Industrial representatives WG* cited that in Hungary there are frozen prices and the Government decreased the price of the energy twice since 2010.

However, certain gaps remain unaddressed; there is no centralised coordination by governments, social tariffs don't exist, and energy poverty is still not precisely defined.

The *Practitioners WG* reported the energy bonus as a measure currently implemented in Italy for electricity and gas, as economic help to support consumers with low income. It is a policy to tackle energy poverty, but it needs to be improved to be efficient.

Evaluation and monitoring of current policies, more focused targeting and setting up of political framework for the above are gaps identified by the WG.

The *EU & National Policymakers and regulators WG* reported the existence of various measures implemented in Greece, namely a social tariff, protection measures from electricity cut-offs, heating oil allowance, and an 'energy saving' at home program for low income households.

These, however, are not focused enough on energy poor households and it should be ensured that allowances are consumed for the purchase of energy products.

The *Local and Regional authorities WG* reported a free home energy assessment visit to anyone struggling to stay warm at home, regardless of tenure in Oldham, a service including advice on how to reduce energy use around the home and use heating controls effectively; help with switching energy tariffs, claiming benefit entitlements (including the £140 Warm Homes Discount) and getting out of energy and water debt; a £30 emergency credit for prepayment meters; draught proofing, LED light bulbs and reflective radiator foils; temporary oil filled radiators if the main heating system has broken down; boiler replacements, central heating systems, cavity wall and loft insulation; and grants for furniture and white goods. In addition, the GMCA with the 10 districts, implements a Warm Homes Fund scheme across Greater Manchester. The scheme helps people in or at risk of falling into fuel poverty and is targeted at households that do not currently have a central heating system and instead have, for example, old storage heaters or gas fires that are expensive to run. The scheme runs from autumn 2018 to the end of August 2019.

On the other hand, there is an urgent need to retrofit the pre-1919 solid wall properties using External Wall Insulation on a street-by-street basis. However, Energy Company Obligation funding is insufficient to cover the full cost of this and, as these properties are usually occupied by low income households, residents are unable to meet the shortfall. Consequently, this essential work has come to a halt in most areas since the Government's Green Deal Communities scheme ended.

The *Academia and think-tanks WG* reported that in the case of Italy, assistance is based on general poverty, and it needs to be requested. In France, on certain occasions it is automatic (e.g. profiles found through tax files), while in Greece, support to vulnerable people for electricity and oil is provided by request and a newly adopted legislation is aiming to create energy communities (suppliers, municipalities, NGOs). In the case of the UK a winter fuel allowance is provided, there is automatic provision for people over 65.

Regarding gaps identified, in the UK efficiency improvements are not addressed at all. Similar efficiency issues exist in Italy, while in Greece current schemes are not targeted. In France, everyone can ask for insulation repair for a 1 euro fee; issues however remain, as this rule applies to house or building owners.

The *Consumers and advocacy WG* reported that both in Italy and Greece there is an Energy Bonus granted to vulnerable consumers, only related to the household income. It applies to electricity, gas and water supply. In Italy, it is managed also by the Municipalities. The number of actual beneficiaries, is, for various reasons, largely lower than potential beneficiaries. The share of households granted is around 30% of those meeting the requirements in Italy and 10-15% in Greece.

Consumers' information and empowerment is the challenge, to decrease the energy need by achieving energy savings and more efficiency without decreasing the comfort levels, but also to allow a larger ability to access existing support measures. Furthermore, since energy efficiency and saving technologies and appliances are expensive and require investments, incentives are needed by vulnerable groups to uptake them. Both tax reductions and direct financial support may be an effective measure.

Proposed solutions and feedback on step-in actions and methodology

The *Industrial representatives WG* prioritised the focus on prevention and increasing the energy awareness of poor people as solutions to go ahead. In addition, better cooperation of the government or local authorities with utilities and local actors, such as social charities and the church, and the implementation of social tariffs for poor customers are of crucial importance. Lastly, the government should be the single point of contact with poor customers and create a database which could be shared with the utilities as soon as GDPR compliance is ensured.

Regarding STEP-IN, all the participants believe that the programme will help to increase the energy consciousness of poor people. Prevention is very important in tackling energy poverty and utilities must take responsibility in it. In line with local stakeholder engagement activities deployed in the field by STEP-IN, cooperation of government and local authorities with local actors such as utilities, social charities and the church is essential to succeed.

The *Practitioners WG* sees the importance of having a financial scheme that works for the energy poor. Analysing the effectiveness of schemes also matters. Integrated dialogue on energy poverty and schemes should involve people outside the energy sector e.g. social, housing, health etc. Regarding STEP-IN, the overall feedback was very positive; the importance of having financial schemes was stressed.

According to the *EU & National Policymakers and regulators WG*, priority must be given to designing specialised energy upgrade programmes for buildings, allowances such as the Energy Card, as well as to fostering market based instruments such as Energy Efficiency Obligation Schemes and energy communities. STEP-IN is seen as a positive methodology for the identification of energy poor households and the design of policy measures. There is the potential for integration of hard data such as indoor condition etc.

The *Local and Regional authorities WG* reported that housing retrofit has to be made a national infrastructure priority so that the necessary investment can be made in older housing stock in order to tackle fuel poverty and meet the 2050 target to reduce carbon emissions.

The *Academia and think-tanks WG* stressed that comfort levels should be considered based on actual consumption against what was achieved. In addition, an agreement on standard measures and the fact that several people cannot afford the cost of power appliances are issues that should not be overlooked.

In line with the STEP-IN methodology, the focus should not be on subsidies (e.g. winter fuel allowance) but mainly on adjusting energy behaviour.

The *Consumers and advocacy WG* viewed that the support measures should be granted to a larger range of beneficiaries. That can be achieved by decreasing the fixed income level as a ceiling to access the Social Bonus and similar measures. New poverty conditions linked to the economic crisis should be accounted and specific indicators should be taken into consideration, to avoid the exclusion of beneficiaries.

The STEP-IN methodology was found to be very interesting and effective, to reach the grass roots level, both in detecting risk factors and effective behaviours, and in delivering practical assistance. It was viewed positively as a pilot testing work. The WG recommended enlarging the experts and stakeholders' community to increase its effective networking by sharing of documents, research findings, data sets, observatories, and events.

Workshop concluding remarks

VaasaETT CEO Philip Lewis summarised the lessons learnt from the 1st STEP-IN NoI workshop. On defining energy poverty, it is very difficult to have a uniformly applied definition of energy poverty, as it constitutes a notion that will always change. A common point of reference is energy needs being met with satisfaction. On meeting minimum requirements, energy needs are different across Europe.

Issues with energy efficiency, income threshold, comfort level being subjective and sometimes set to general poverty level (e.g. Italy, France). A set of indicators shared and agreed throughout Europe has to be aligned to national situations: climate conditions, energy sources' accessibility, prices, taxation etc. A common reference basis and additional specific criteria are needed to allow a proper assessment of energy poverty across the EU; this would result in a benchmarking methodology to be applied. In specific cases (e.g. Greece), a decision on a definition is subject to frameworks such as National Action Plans for combating of energy poverty. Lastly, energy poverty related discussions, should not only focus on socio-economic factors, but also consider the specifications required by relevant actors e.g. the utilities (amount of debt, age of debt, number of disconnections etc.).

With reference to measures currently taken there are a several ongoing efforts across Europe: frozen energy prices in Hungary, the energy bonus in Italy, various measures implemented in Greece, (social tariff, protection measures from electricity cut-offs, heating oil allowance, and an 'energy saving at home' program for low income households), and free home energy assessment visits to anyone struggling to stay warm at home, regardless of tenure in the United Kingdom. On certain occasions (France, United Kingdom) assistance is automatic. In the case of Italy, it is based on general poverty, and needs to be requested.

On gaps identified regarding ongoing measures, lack of centralised coordination by governments, the need for evaluation and monitoring of current policies, the fact that measures are not focused enough on energy poor households, the urgent need to retrofit old solid wall properties, consumers' information and empowerment, as well as the need to expand the number of current beneficiaries that are assisted, dominated the WGs discussions.

Emphasis from now on should be laid on prevention and increasing the energy awareness of poor people as solutions to go ahead. Priority must be given to designing specialised energy upgrade programmes for buildings, allowances open to a larger number of beneficiaries by decreasing the fixed income level as a ceiling to access benefits, fostering market based instruments (Energy Efficiency Obligation Schemes, energy communities), financial schemes that work for the energy poor, as well as on the inclusion of housing retrofit in national policies.

STEP-IN is embraced by the stakeholders as a programme that will help to increase the energy consciousness of poor people. The overall feedback was very positive. Aspects that drew attention were the importance of having financial schemes recommendations, the STEP-IN local stakeholder engagement methodology that involves collaboration of local actors as an essential aspect to succeed in the field, the policy recommendations, as well as the project's focus on adjusting energy behaviour of individuals in need. Regarding the methodology for the identification of energy poor households, the potential for integration of hard data such as indoor conditions was noted. Lastly, with reference to the formation and activities of the Nol WGs, enlarging the experts and stakeholders' community to increase its effective networking by sharing of documents, research findings, data sets, observatories, events etc was requested.

Philip concluded that "bringing all the stakeholders together will more likely lead to solving the problem than if people were working separately. There is a lot of support on what has been done in the STEP-IN Living Labs, as well as the desire to work closely with the stakeholders".

Post-workshop communication

A press release that reports on the workshop and its outcomes, is published on the project's website. The report has been published as a news item on the STEP-IN public website and was sent out to more than 250 journalists by ARTTIC, the partners responsible for public relations and communication. The press release is also published on Cordis Wire and EU Agenda. Shortly the third Nol newsletter will be issued with more information and access to workshop materials for the Nol members.

5. Conclusions

This report illustrates that, following the completion of the first 12 months of the project (June 2018 to May 2019), the STEP-IN consortium has successfully:

- Developed a Nol engagement strategy including a consultation and an engagement plan;
- Established a stakeholder Nol;
- Developed communication tools and feedback mechanisms to effectively reach the Nol;
- Shaped operational Nol WGs;
- Ran the 1st Nol workshop in Athens and thus completed the first round of stakeholder engagement activities aiming to obtain feedback on the project methodology as well as on actions needed to tackle energy poverty in Europe.

The first phase of stakeholder engagement brought to the surface various challenges identified by the STEP-IN Nol with an impact to the combating energy poverty. In the coming period, Nol members will be requested to define clear roles and responsibilities for stakeholders to effectively co-design strategies for tackling energy poverty across Europe. Conclusions drawn from the first engagement phase will serve as a starting point and best practices will be examined.

This will require careful planning and management to ensure Nol members' involvement to the project and continue an effective, consistent and coherent dialogue throughout the project duration, so that the foreseen policy recommendations will be relevant in the post-project period.

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