



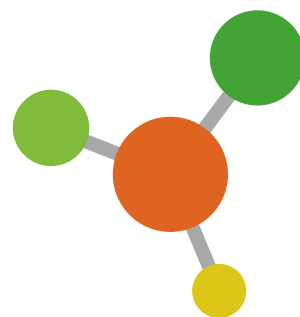
European
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SCALING UP INNOVATION TOGETHER FOR ENERGY VULNERABILITY



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



SUITE

SCALING UP INNOVATION TOGETHER
FOR ENERGY VULNERABILITY

PLAN WITH A REGIONAL COVERAGE

Małopolska Region **Poland**



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REGIONAL **COVERAGE PLAN**MAŁOPOLSKA
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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

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.

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.

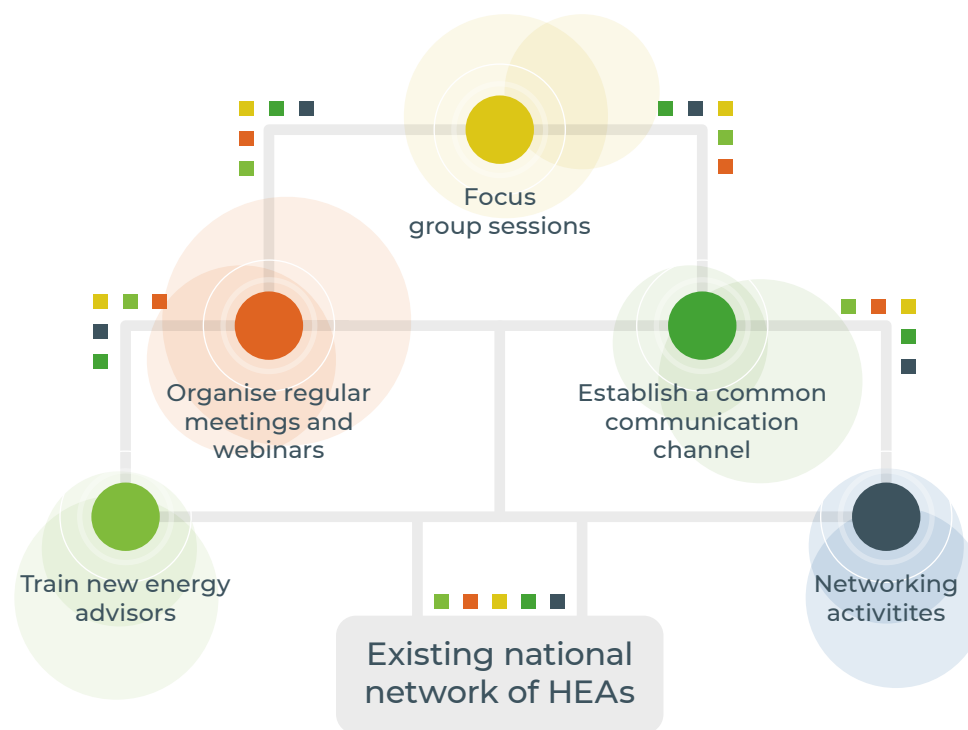
Besides training new energy advisors by adapting the already existing training materials, the model aims at scaling the already developed **national network of HEAs** during the ASSIST project. So far, the network has been built between everyone who was trained in the ASSIST project. However, it was 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 1:
Activities for scaling the existing
national network of HEAs



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.

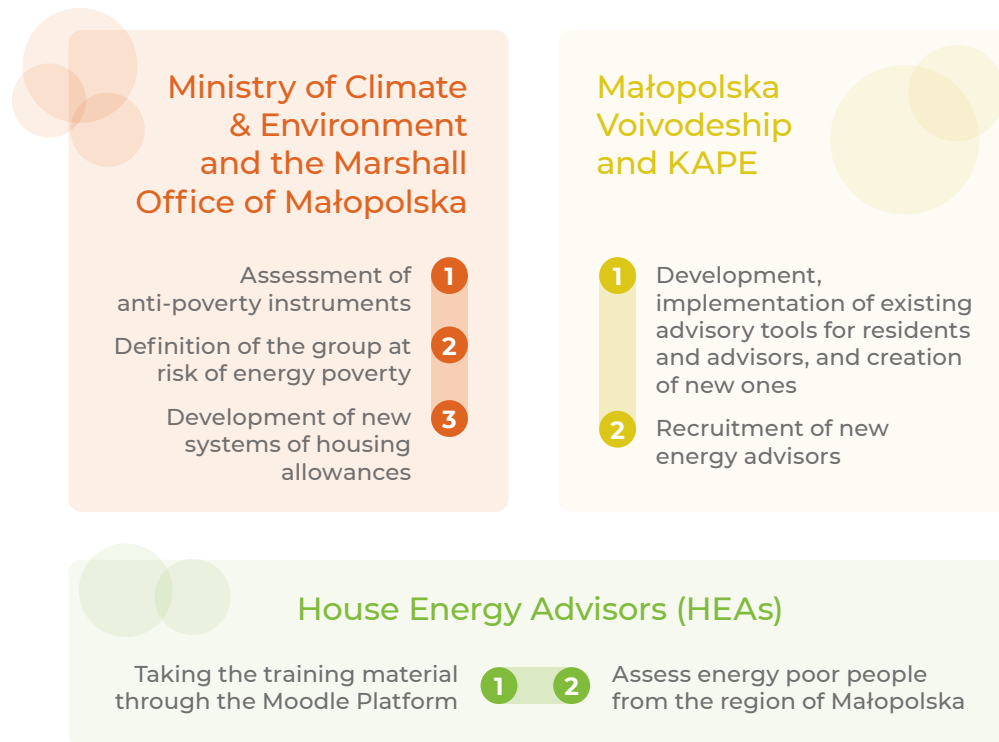


Figure 2:
National Network of
HEAs structure

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

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.

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.

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 poverty².

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 play 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 table below 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.

Table 1:

List of participants to the Focus Group Session and interviews



22 people	11 people
Focus Group Participants	Interviewed actors
<ol style="list-style-type: none"> 1. Marshal Office of the Małopolska Voivodeship (3) 2. Ministry of Climate and Environment (2) 3. Institute for structural research 4. National Fund for Environmental Protection and Water Management 5. Municipality of Skawina 6. Municipality of Tuchów (2) 7. Marschal Office of the Silesian Voivodeship 8. Silesia – Śląski Związek Gmin i Powiatów 9. Forum Energii 10. HABITAT 11. Federacja Konsumentów 12. City of Częstochowa 13. OPS Gliwice (Welfare System) 14. PNEC – Energy Cite 15. KAPE (3) 	<ol style="list-style-type: none"> 1. Marshal Office of the Małopolska Voivodeship 2. Ministry of Climate and Environment 3. HABITAT 4. Municipality of Skawina 5. OPS Skawina (Welfare system) 6. Municipality of Tuchów 7. OPS Tuchów (Welfare system) 8. Municipality of Zakopane 9. Municipality of Niepołomice 10. Municipality of Raciechowice 11. Silesia – Śląski Związek Gmin i Powiatów

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](#))

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 2:

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.

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 (www.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.

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

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.

Table 3:
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.

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 4:
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																										

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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 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. 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.

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 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	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

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.

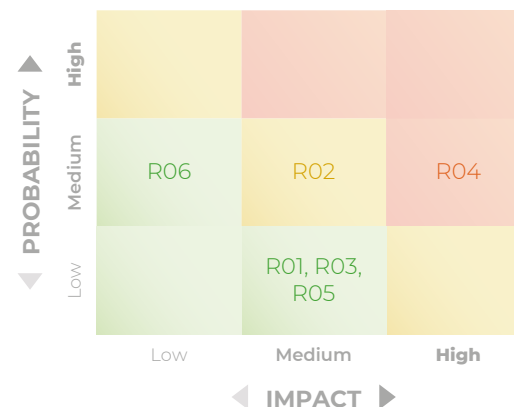
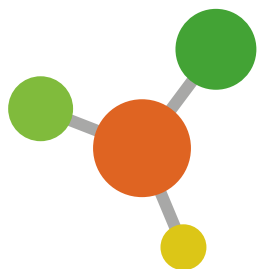


Figure 3:
Impact – Probability matrix



SUITE



Krajowa Agencja
Poszanowania Energii S.A.



CEEC
Clúster de l'Energia
Eficient de Catalunya



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