WORKSHOP REPORT
THE DECIDE SELF-ASSESSMENT TOOL FOR MEASURING THE MATURITY AND SCALABILITY OF COLLECTIVE ENERGY INITIATIVES

Event date: 11/05/2023

This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 894255.
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PROJECT CONTRACTUAL DETAILS:

Project Title	Developing Energy Communities through Informative & Collective actions
Project Acronym	DECIDE
Grant Agreement No.	894255
Project Start Date	02-06-2020
Project End Date	02-06-2023
Duration	36 months
Supplementary notes:	This document is only for use among the Partners of DECIDE

CONTENTS

OUTLINE OF THE WORKSHOP

Organisation and Concept	Ludwig Karg (BAUM), Andreas Klär (HIND), Matteo Vanzini (PI)
Event Title	DECIDE Measuring the Maturity and Scalability of Collective Energy Initiatives with a Self-Assessment Tool
Time and Place	11 May 2023, 13:00h-15:00h CEST, online
Lead Organisation	BAUM
Main Author(s)	Anne-Kathrin Vorwald (B.A.U.M.), Marius Buck (EWH)
Contibutors	Ludwig Karg (B.A.U.M.), Andreas Klär (EWH), Matteo Vanzini (Prospex Institute)

1. BACKGROUND

Energy supply in Germany is diverse and quite complex. Among other things, the role of the approximately 1,000 mostly municipal, public, and regional utilities must be taken into account, as well as the importance of the approximately 1,000 (citizens') energy cooperatives (CEC). Germany has not fully transposed the EU provisions for energy communities into national law. However, there is a long tradition of citizen-financed projects that are considered energy communities in the broader sense. Cooperatives have a longstanding tradition in Germany. There are almost 1,000 cooperatives for the operation of renewable energy plants. These often aim to use the electricity generated in their plants themselves. The implementation of the EU Directives on Energy Communities could give these cooperatives the opportunity to implement self-consumption models. Several aspects need to be taken into account when implementing the EU directives on renewable energy and citizen energy models. This is one reason why they have not been (fully) transposed into national law so far. For example, there should be a mutually beneficial cooperation between the new players in the energy system and the municipal utilities that have been operating sustainably in their municipality or region for a long time. Fragmentation of the energy markets or even competitive situations on the market could hinder the urgently needed energy transition.

TARGET

Against the background of the amendment of the Renewable Energy Sources Act (EEG 2023) and based on the experiences from numerous research, development and innovation projects in Southern Germany (DECIDE, pebbles, IRENE, AlpGrids, ...), potentials for a rapid development of distributed, cooperative, stable and cost-efficient energy systems will be identified in a discussion with practitioners and relevant framework setters. Stakeholders from public and private energy utilities as well as representatives from associations and municipal and regional development will discuss ways forward in times of unprecedented challenges. If possible, the experts will prepare a Memorandum of Understanding to be used or published within the DECIDE project.

2. REPORT OF THE EVENT

INTRODUCTION

The online workshop was opened by Ludwig Karg, co-organizer and moderator, through a Zoom session. He provided a brief introduction to the program, shared the meeting agenda, and initiated a discussion about the participants' backgrounds. Attendees represented diverse sectors and countries, with a notable presence of consultants and participants from Austria.

Ludwig Karg, who leads a task force of the EU Commission responsible for implementing directives for energy communities, presented an overview of cooperative approaches and their potential in Europe and Germany. He highlighted the challenges organizations face in maturing and scaling up their projects. In response to these struggles, the Maturity and Scalability Tool was introduced as a valuable resource developed by DECIDE.

The Maturity and Scalability Tool is a self-assessment tool specifically designed to assist leaders and representatives of collective energy initiatives in understanding the current state of their projects, including

their strengths and weaknesses. Developed by DECIDE, based on the work of RESCOOP and JR in the H2020 project COMPILE, this tool offers valuable insights and recommendations to further develop these initiatives.

The tool focuses on three key aspects: market impact, supportive environment, and functional internal organization and democratic representativeness. Market impact assesses the initiative's active participation in the energy system, while the supportive environment evaluates the extent to which the initiative operates within a favourable external context. Functional internal organization and democratic representativeness measure the efficiency of internal processes and the initiative's ability to represent the will of its members.

The tool also assesses the maturity, scalability, and replicability of an initiative. Maturity considers the initiative's resilience and robustness in facing unexpected changes in the energy system, while scalability evaluates its ability to function effectively as it expands. Replicability examines whether the initiative can be successfully reproduced in different environments.

To provide a comprehensive evaluation, the Maturity and Scalability Tool identifies eight relevant dimensions. These dimensions include the community, evaluating member and supporter involvement, as well as key personnel. Economic stability assesses the financial sustainability of the initiative, while political and societal backing gauges support from relevant stakeholders.

The tool also examines the technical and organizational setup to determine the effectiveness of the initiative's operational structure and technological systems. A learning organization dimension is included to assess the initiative's capacity for continuous improvement. Upscaling is evaluated based on societal and geographical factors, measuring the initiative's ability to expand its social impact and geographical reach. Lastly, the market conditions dimension assesses the initiative's adaptation to prevailing market dynamics.

The tool is administered through a survey, encouraging leaders and representatives to invite others from their initiative to complete the questionnaire. By comparing their answers, participants gain direct feedback on the eight categories, enabling them to identify key areas for improvement and take targeted action as can be observe in Figure 1.

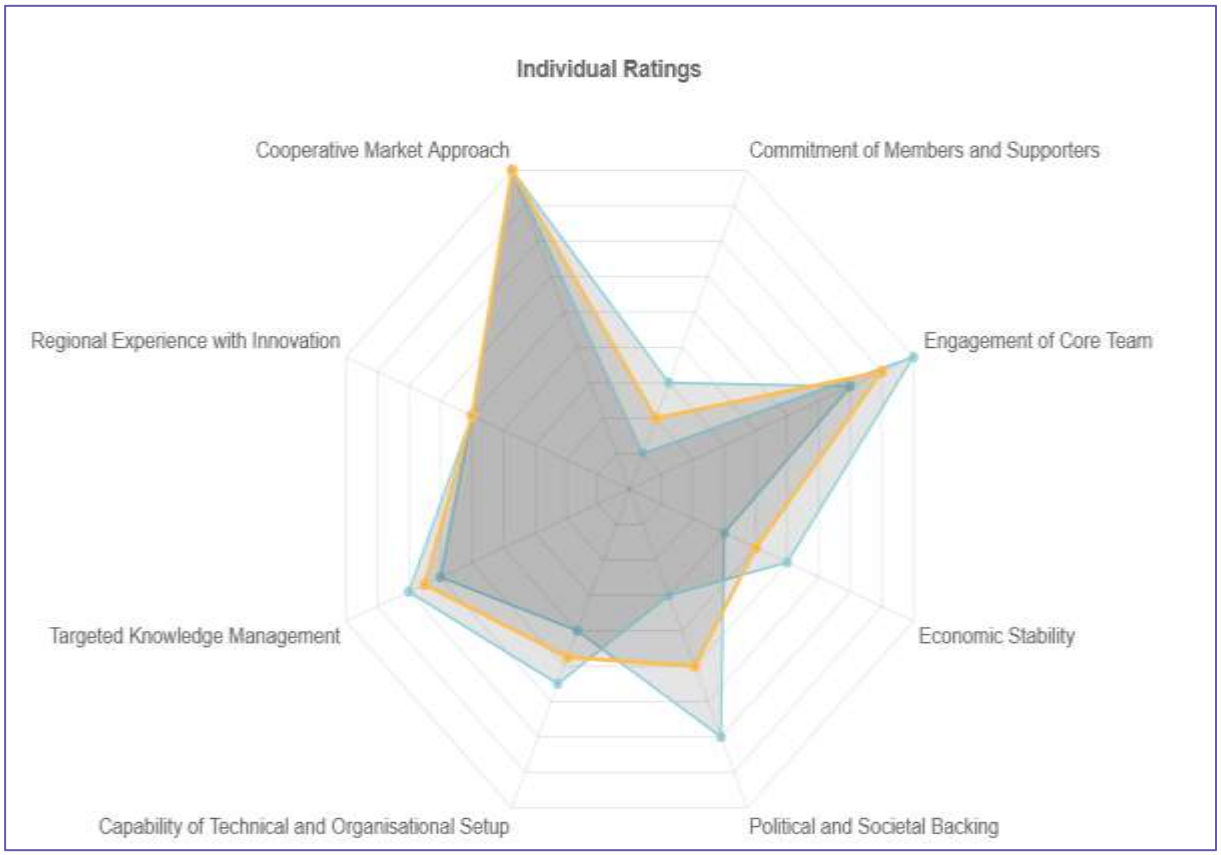

Figure 1. Three individual results from the Maturity and Scalability Tool. Differences in the responses help to understand the perception of different people regarding a project in the 8 maturity and scalability areas. Image taken from the meeting.

In summary, the Maturity and Scalability Tool offers initiative leaders and representatives valuable insights into the development of their projects. It facilitates the identification of improvement areas and provides recommendations for further growth. This tool serves as a valuable resource for organizations striving to successfully mature and scale up their energy initiatives.

Participants opinions: what does the participants feel about the tool?

During the meeting, participants were given the opportunity to express their opinions about the tool. Using Slido, they were asked to share their impressions in writing. The responses were analysed using a Word Cloud, which highlighted the most frequently used words. Some words that stood out the most were "Nice," "Promising," and "Interesting" as Figure 2 illustrate. This indicates that participants liked the tool and showed genuine interest in it.

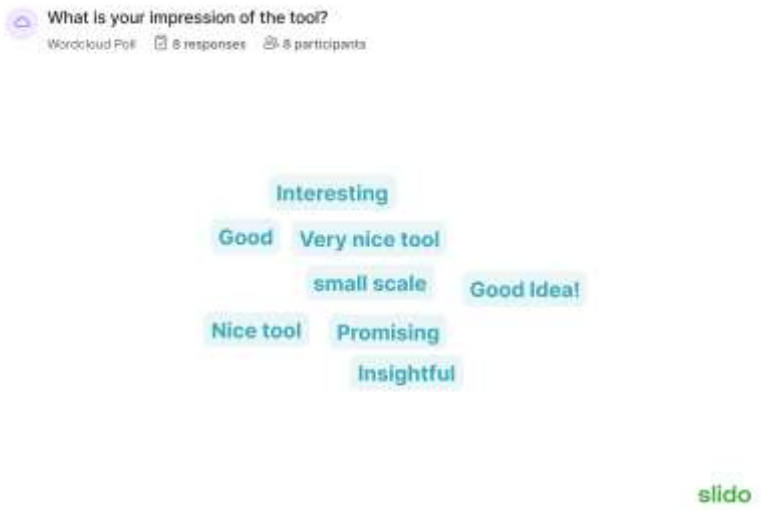

Figure 2. Impression of the tool from participants (n=8). Made with Slido.

Additionally, participants were asked to rate their likelihood of using the tool on a Linkert scale ranging from 1 to 5, where 5 indicated a definite intention to use it and 1 indicated no intention to use it. The overall result is shown in Figure 3 where the score was 4.3, suggesting that participants were highly likely to utilize the tool. This further confirmed their interest and enthusiasm for its potential.

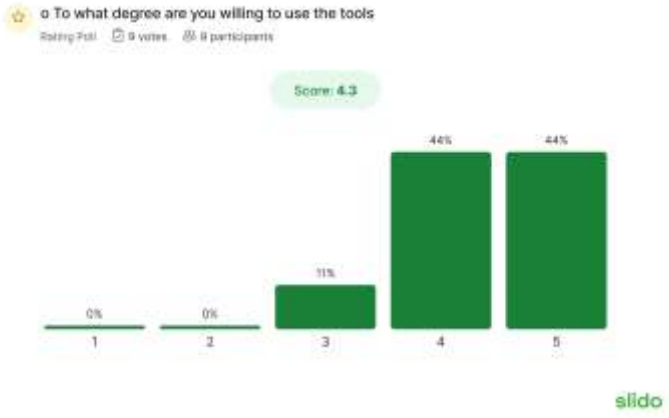

Figure 3. Participants likelihood of using the tool (n=9). Made with Slido.

Furthermore, participants were asked to specify at which stage they would utilize the tool. By examining the responses using a Word Cloud illustrated in Figure 4, key phrases such as "regularly," "in the beginning…," "after a year," and "several times throughout the life cycle" stood out prominently. This indicates that participants perceived the tool as valuable throughout the various stages of project development. They recognized its potential to contribute to continuous improvement and identified it as a resource to be utilized consistently.

Figure 4. Participants preferred stage for using the tool (n=7). Made with Slido.

Finally, participants were prompted to identify which other team members they would invite to complete the survey. The results from the Slido Word Cloud analysis revealed that the most frequently mentioned categories were "Coral Team Members," "Members," and "Board" as shown in Figure 5. This indicates that participants intended to involve individuals from these specific teams within their organization, recognizing the importance of their input and collaboration in utilizing the tool effectively.

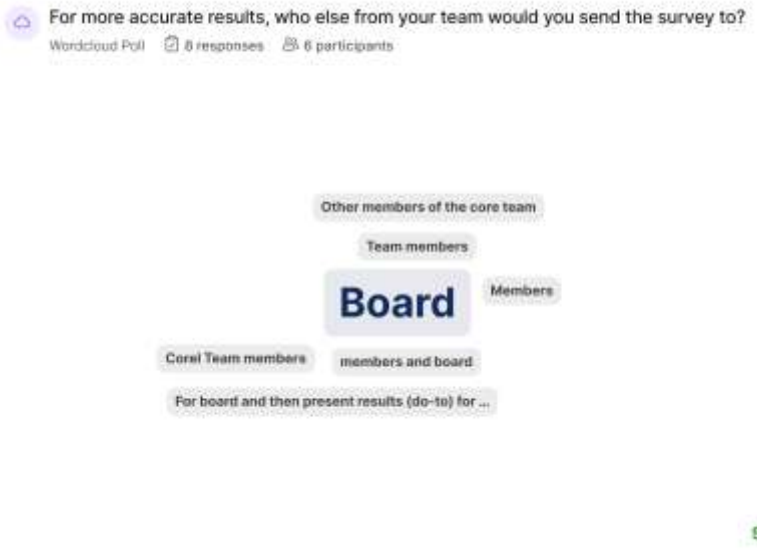

Figure 5. Team Members that participants would Involve in the methodology process (n=6). Made with Slido.

Overall, the participants' feedback highlighted their positive impressions of the tool, expressing interest in its potential applications. Their likelihood to use the tool was high, and they recognized its value throughout

different stages of project development. Additionally, they identified key team members who should be involved in the survey process, emphasizing the importance of collective engagement and collaboration within their organizations.

PARALLEL WORKING SESSIONS ON HOT TOPICS

During the final part of the meeting, participants engaged in parallel working sessions to delve into two main topics related to the tool. The first topic was "Upscaling and Replication: Relevance for Energy Communities and Collective Action", while the second topic centered around "Members and Customers: Relevance for Energy Communities and Collective Action."

During the Upscaling and Replication session, participants explored two different strategies for growth. Upscaling involves expanding within the same target group or organization, while Replication entails expanding into new target groups or organizations, often accompanied by the introduction of additional services or business models.

In the subsequent section focused on Members and Customers, participants distinguished between these two roles within the initiative. Members are actively involved in the initiative, contributing to its strategy, decision-making, and day-to-day operations. On the other hand, Customers benefit from the initiative's services or products without actively participating in its strategic or operational aspects.

Upscaling and Replication: Relevance for Energy Communities and Collective Action - Results

The outcomes of the working session on Upscaling and Replication, as depicted in Figure 6 on Miro, highlighted key insights. Overall, participants reached a consensus regarding the benefits of Upscaling and Replication for energy communities and collective action. They acknowledged that these strategies contribute to increased visibility, a larger number of prosumers (producer-consumers), and enhanced lobbying power.

Additionally, the importance of guidance and support was emphasized during the discussion. Participants recognized the need for umbrella organizations that can provide valuable guidance to projects, enabling them to enhance their replicability and achieve faster growth. The role of such organizations in facilitating and accelerating the development of initiatives was identified as crucial for their success.

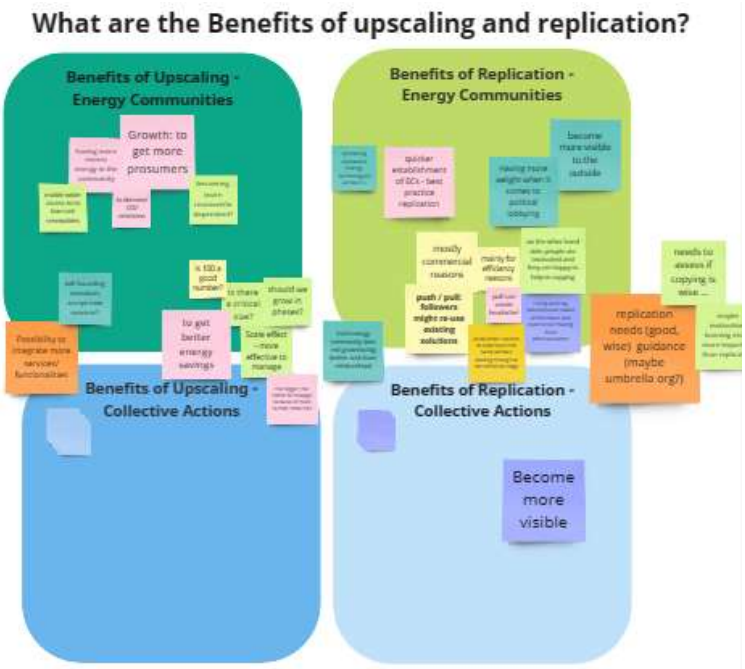

Figure 6. Results from the Upscaling and Replication working sessions. Made with Miro.

These results shed light on the positive perceptions surrounding Upscaling and Replication and underscored the significance of guidance and umbrella organizations in fostering the replicability and rapid growth of energy community projects.

Members and Customers: Relevance for Energy Communities and Collective Action - Results

Figure 7 illustrates the outcomes of the working session focusing on Members and Customers. Participants expressed a consensus regarding the expectations of members within energy communities. They emphasized the importance of having influence on decision-making processes and assuming responsibilities within the initiative. Additionally, participants highlighted the need for well-organized structures within energy communities to facilitate effective collaboration among members. In contrast, collective actions were seen as having a more informal structure, allowing for greater flexibility and adaptability. With Collective Actions, they expect regular meetings and also the possibility to infleunce decistions.

Participants acknowledged that consumers, who may also be members, have specific expectations. They expressed the desire for regular newsletters and relevant project information that outlines how they can actively contribute. Furthermore, participants emphasized the importance of providing information in a user-friendly manner with low complexity to ensure accessibility and engagement from consumers. Also, within energy communities, they expect a good service, meaning stabil supply, pay for local values, being infomrmed about the progress, and they don’t want o decide (they just want to be served).

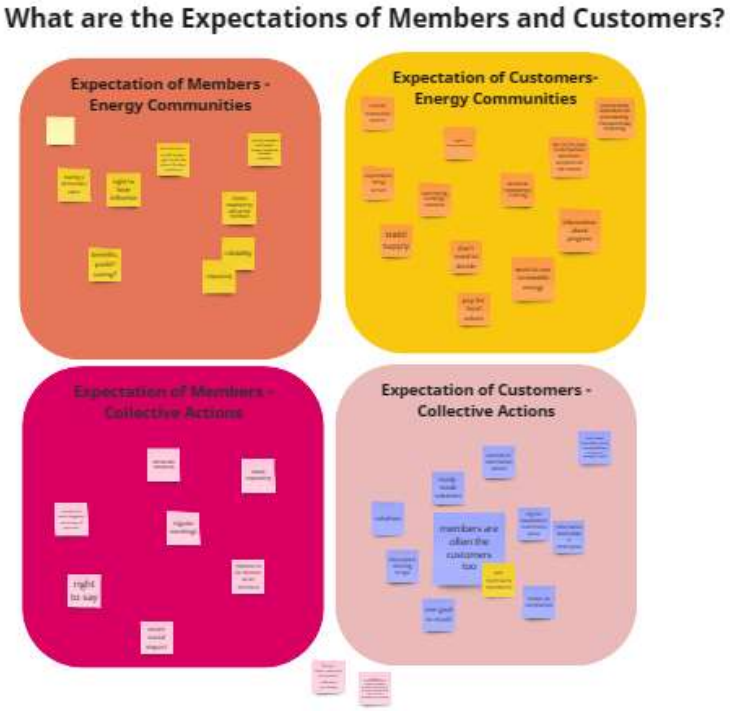

Figure 7. Results from the Members and Customers working sessions. Made with Miro.

These insights from the discussion shed light on the expectations of members and customers within energy communities and collective actions. They underscore the significance of involving members in decision-making processes and establishing structured frameworks while catering to the specific information needs and preferences of consumers to served them well and received good feedback from them.

END OF THE MEETING

After the productive working sessions, participants were given the opportunity to experience the tool firsthand, allowing them to explore its features and functionalities. They had a chance to engage with the Maturity and Scalability Tool and assess its usefulness in their respective initiatives.

Concluding the meeting, Ludwig Karg, the co-organizer and moderator, expressed his gratitude to all participants for their valuable contributions. He shared that the feedback received throughout the session was overwhelmingly positive, indicating a genuine interest and appreciation for the tool. Participants' favorable impressions and enthusiasm further demonstrated their recognition of the tool's potential to support organizational maturity and scalability in energy projects.

Overall, the meeting concluded on a high note, with participants expressing satisfaction and a keen interest in utilizing the Maturity and Scalability Tool for their own initiatives. The positive feedback received provided reassurance of the tool's effectiveness and affirmed its relevance in helping organizations achieve their growth objectives.

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