

D2.4.

Update Energy Communities Governance Toolkit - Prototype



Deliverable Information Sheet

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List of Acronyms

BM	Business Model
COP	COMANAGE Open Platform
CSO	Civil Society Organisation
DIY	Do it Yourself
DSO	Distribution System Operator
DSS	Decision Support System
EC	Energy Community
ECBM	Energy Communities Business Model
ECGT	Energy Communities Governance Toolkit
ERI	Energy Related Investment
EU	European Union
GSE	Gestore Servizi Energetici (in Italian)
KoM	Kick-off Meeting
LLM	Large Language Model
M	Month

NGO	Non-governmental Organisation
OIS	Operational Integrated Services
OSS	One Stop Shops
PA	Public Administration
PPP	Public-Private Partnership
PPT	PowerPoint Presentation
PV	Photovoltaic
RECs	Renewable Energy Communities
SME	Small and Medium Enterprises
TSO	Transmission System Operator
TSP	Transformative Scenario Planning
VALERI	Valuation of Energy Related Investment
WP	Work Package

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Keywords list

Toolkit
Template
Energy Communities
Tools

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1. Executive summary

Over the past years, several projects boosting energy communities have seen the light around the EU. The launch and implementation of these initiatives carried out, among others, by projects in which the members of the COMANAGE partnership participate, has made it evident that once started energy communities' projects often struggle to take-off. The COMANAGE proposal originates from this experience, with the aim of tackling and counteracting the main governance and management barriers - including a series of legal, administrative, financial, social, and organizational hurdles - faced by citizen-led and public-participated energy communities' projects.

It will do so by creating a methodological and operational **Energy Communities Governance Framework**, and by equipping public authorities involved in energy communities' projects with a set of integrated services, supporting mechanisms and tools aimed at facilitating the management and governance of energy communities and other forms of citizen-led energy initiatives, ensuring their growth and sustainability in the medium and long term: the **Energy Communities Governance Toolkit (ECGT)**.

The final goal of the project is twofold: first, to ensure that energy communities' projects that have already been set-up can take-off and grow in the medium and long term. Second, to encourage and stimulate the uptake of new community-owned energy projects. With this goal in mind, the project has on one hand operationalized a transnational network of knowledge and competence providers; and on the other, it has mobilized, engaged, and operationalized key stakeholders around three Operative Integrated Services (OIS) Hubs to be established in three Pilot Cases across the European Union (EU) represented in the consortium by the Metropolitan Area of Barcelona in Spain (AMB), the Krakow Metropolis Association in Poland (KMA), the Lazio National Association of Italian municipalities in Italy (ANCI LAZIO).

This document describes the updates done during the project to the **COMANAGE toolkit prototype** which has the aim of supporting local and regional governments participating in and providing support to energy community projects, by using tools that ensure their mid-term and long-term sustainability beyond their creation. As part of the project, a first prototype was created as a beta version of the final COMANAGE Toolkit. Along the implementation of the Pilot Executive Plans, this prototype has been improved and updated according to the specific community, target group, and participation context of the three Pilots area, AMB, KMA and ANCI LAZIO. Hence, the methodology provided for the development and implementation of the toolkit will guide energy communities through a set of selected tools that will reduce complexities, simplify decision-making, facilitate the management and governance and provide strategies for the mid- and long-term sustainability of existing energy communities and for their replication on the territory.

Specifically, the COMANAGE toolkit has the objective of supporting and equipping local, metropolitan, and regional governments with mechanisms and services that facilitate the collaboration with the citizenship involved in energy projects. The premise of this toolkit was overcoming specific governance barriers of existing energy projects that COMANAGE partners have identified in deliverable *D2.2 Energy Communities barriers, needs and best practices analysis* through desk research and qualitative analysis with experts. This premise is being demonstrated in the various workshops conducted with municipalities in the pilot areas.

2. Introduction

On the base of the analysis and research performed at the beginning of the project, included in deliverables *D2.1 Energy communities' holistic framework and collaborative methodology* and *D2.2 Energy Communities barriers, needs and best practices analysis*, this deliverable aims to propose a flexible and adaptable set of tools, supporting mechanisms and integrated services supporting local and regional government staff and officials in the management of energy communities' projects. The Energy Communities Governance Toolkit (ECGT) serves as a guide when public bodies participate in an energy community providing parameters that need to be analysed. This general prototype has been refined and tailored to the specific pilot cases context and tested within the COMANAGE Operational Integrated Services (OIS) Hubs. Based on the testing results and feedback collected, the tools have been improved and updating along the project. The general objectives of the ECG Toolkit are:

- To provide background information and guidance on methods and tools needed to successfully run an Energy Community (EC) initiative in the mid/long-term.
- To develop effective engagement strategies to satisfy expectations and ensure continued participation.
- To overcome Legal Barriers for both municipalities and Energy Communities.
- To integrate all tools and services in one single place.

The ECG Toolkit includes a set of different legal, training, financial and organizational tools and services needed by public administration for an effective management and support of community energy citizen-led initiatives. To achieve the desired project objectives and anticipated outcomes, a diverse network of experts, knowledge providers, and competence providers haven been engaged. Their purpose was to collaborate in the co-design, testing, and implementation of the Energy Communities Governance Framework in the three pilot cases, solving the encountered barriers as showed in the image below (Fig.1). Different experts were also key actors for the improvement and updating process of the developed tools.

Improvements were mainly done to Legal, Technical and Financial tools. Even though feedback was gathered for all the tool categories, no improvements were suggested for Social Participation and Communication tools.

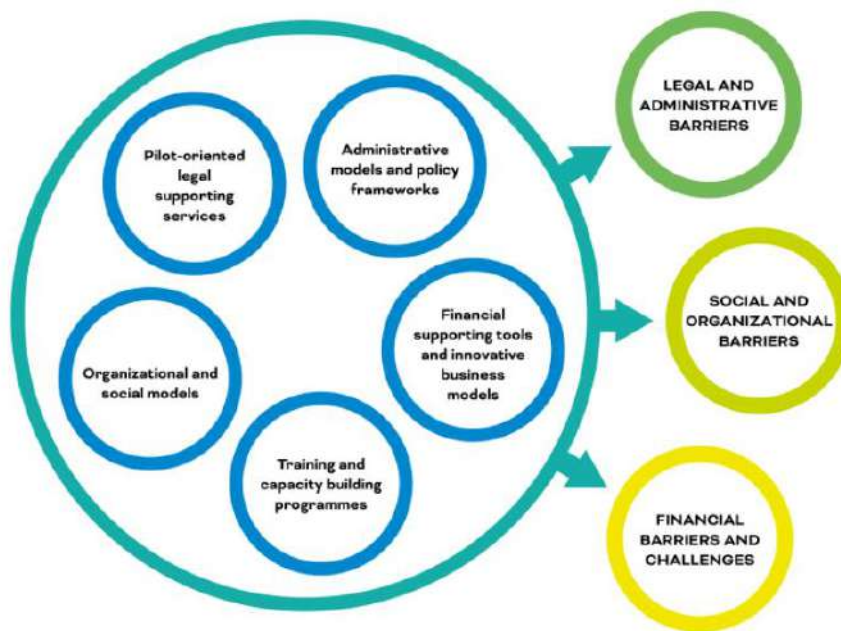


Figure 1. COMANAGE ECGT Tools and Barriers

The tools used to solve these barriers are **mainly five**:

- Legal supporting services that focus on providing legal assistance and guidance to ensure compliance and the proper functioning of energy communities. These services are consistently different according to the context and region of implementation, aiming at providing support to municipalities in overcoming specific legal barriers identified, targeted to their local contexts, needs and specific requirements.
- Administrative models and policy frameworks for effective administrative processes and policies that support energy communities' operations and energy sharing. These models enable inter-municipal management of energy projects and appropriate governance, facilitating connections between different actors in the value chain through public-private partnerships (PPPs).
- Financial supporting tools and innovative business models to provide financing options and innovative business approaches for energy communities. Their aim is to promote the long-term viability and sustainability of energy projects by enabling citizen financing and bank loans, exploring innovative business models for easier access to public-private partnerships, and offering technical and financial support from the initial stages to the complete implementation of project development.
- Organisational and social models, structures, and governance mechanisms for energy communities, ensuring efficient decision-making and participation. These aim to maximise the social impact of cooperative projects by effectively transforming energy communities into local hubs or platforms for raising awareness, communication, and education. This transformation enhances social cohesion, citizen participation, and collective activism while also attracting and engaging additional stakeholders and participants.

- Training and capacity building programs that focus on the development and implementation of training initiatives and capacity-building programmes to enhance the knowledge and skills of energy community members. The objective of these tools is to provide public authorities involved in citizen-led energy initiatives with accessible training materials and practical guidance on various aspects of community projects, including establishment, financing, operations, management, and governance. These resources will be developed based on a comprehensive analysis of knowledge and capacity gaps among different stakeholders, specifically targeting the identified areas of improvement. Finally, these programs seek to establish regional and municipal teams composed of technical experts working alongside individuals trained in social sciences and/or communication. This interdisciplinary approach promotes collaboration and knowledge-sharing among team members, enabling a holistic and well-rounded approach to energy initiatives.

The toolkit is designed for municipal staff and citizens who need local government support in the long-term management of energy communities' projects and One Stop Shops (OSS) existing services. As for the research and implementation done specifically within the UP-STAIRS project, which can be considered as part of the COMANAGE baseline, the OSS are dedicated local or regional info points, providing comprehensive support from start to finish to the customer, including information communication, technical assistance, financial structuring, provision of financial support, and monitoring of energy savings. The aim is to foster strong partnerships with local actors such as SMEs, financial institutions, and energy agencies, while facilitating the implementation of energy-saving and sustainable projects for interested but not yet committed energy users/asset owners.

Depending on the initiative, the specific context, and level of development of the EC, a diverse range of stakeholders can be involved in the deployment and usage of the tools. A wide array of stakeholders can be engaged in the process, including energy companies, policymakers, regulatory bodies, research institutions, local communities, and environmental organizations, among others. These stakeholders bring diverse perspectives, expertise, and interests to bear on the implementation and utilization of the different tools, ensuring a holistic approach that considers various dimensions of the energy sector.

Furthermore, the different tools provided cater to different stages of the energy transition, encompassing the early stage, expansion stage, and long-term stability. By tailoring the toolkit to the unique needs and challenges encountered at different stages of the EC's development, stakeholders can optimize its functionality and maximize its impact on promoting sustainable energy practices, enhancing energy efficiency, and mitigating environmental impacts. This tailored approach facilitates a more targeted and comprehensive deployment of each tool, thereby facilitating the achievement of the EC's objectives in a more efficient and effective way. The three possible stages outlined above; early stage, expansion stage, and long-term stability will be tagged in the tailoring part of every tool.

As the **toolkit structure** concerned, has been designed as follows:

- Throughout the toolkit, there are specific tools organized in different categories. Each tool has a sort of worksheet which provides a brief description, the format, the main features (content, sections, and timeline), the target audience (who will use the tool) and the stakeholders involved (who will help for the tool implementation).
- To illustrate how to use the tools examples are included throughout the toolkit as technical notes (in the coloured boxes). A more in-depth description or technical details for those with a particular interest or with a technical background are included in the Annexes at the end of the toolkit.

The tailoring needs section, details which specific tailoring actions were done, when needed, to better adapt the tools both to the users' needs and the context of the project pilots. The COMANAGE toolkit does not address how to create and implement Energy Community initiatives in their initial stages of development. In contrast, its main objective is to **provide comprehensive resources and guidance for a long-term sustainability and economic stability**, however, there are some tools which could be useful at early stages of establishing an energy community. The toolkit aims to equip stakeholders with the necessary tools and knowledge to effectively anchor and deploy a long-term strategy for the fair and spread development of Energy Community initiatives. It addresses key aspects such as governance structures, legal frameworks, financing models, operational strategies, and community engagement. By offering practical guidance and best practices, the toolkit aims to empower stakeholders to navigate the complex process of initiating and sustaining Energy Community projects.

The different stakeholders involved, by using the ECG Toolkit, are able to overcome challenges, leverage opportunities, and foster the growth and success of their EC. The development and implementation process of the ECG Toolkit consisted of the following consecutive phases:

- The co-designing and planning phase in which the COMANAGE consortium has collaborated to create a prototype of the toolkit, tailored to the specific contexts, and needs of the three pilot cases. Representatives from the pilot cases and the Hubs (Hubs Managers) have actively participated in and contributed to the project, including the co-design process for the development of three Pilot Executive Plans.
- The implementation and piloting phase, following the pilot-targeted Executive Plans, the ECG Toolkit Prototype has been tested and implemented in the three pilot cases through actions carried out by the three OIS Hubs. The measures, supporting mechanisms, integrated services, and tools implemented in each pilot case have been customized based on the local governance barriers and unique needs of each territory. The Knowledge Providers Partners (Ecoserveis, Co-opAbility Institute, ANESE, and AISFOR SRL) have supported the pilots (AMB, KMA and ANCI Lazio) during the co-design and piloting phase.
- Toolkit fine tuning, once all tools were available in the COMANAGE Open Platform, strong promotion was carried out by the project pilots, together with event and face-to-face training sessions. As soon as stakeholders started using the provided tools, feedback was collected both to improve existing tools and create new tools that we considered necessary. During this phase, external experts were also key actors to consider.

3. Methodology

The methodology employed in the development of the Energy Communities Governance Toolkit (ECGT) within the COMANAGE project aimed to implement the co-design process outlined in the Theory U of deliverable *D2.1 Energy communities' holistic framework and collaborative methodology*, while tailoring it to the specificities highlighted in deliverable *D3.1 OIS Hubs stakeholders' engagement and mobilization Plan*. The objective was to test and implement the toolkit in three pilot cases. The COMANAGE ECG Toolkit design framework comprises **five main elements**: legal supporting services, administrative models and policy frameworks, financial supporting tools and innovative business models, organizational models, and training and capacity-building programs.

The main steps followed to create this toolkit were a benchmarking study and desk research on existing projects and initiatives that have developed toolkits. Each component of the toolkit provides solutions and technical guidance to public administrations at the local, metropolitan, and regional levels that support energy communities to address existing barriers and build up a long-term and sustainable strategy.

The **benchmarking study** involved comparing and evaluating the performance, practices, and outcomes of different energy community initiatives. It started with the COMANAGE Kick-off session, in which during one of the dynamics deployed, the project partners identified barriers and possible linked solutions. This included the analysis of best practices and selected case studies in the previously identified countries, key success factors, and areas for improvement, taking into consideration aspects such as governance structures, energy generation and consumption patterns, community engagement strategies, financial models, and technical solutions.

The first step was followed by an initial **research and overview on energy communities' initiatives** aimed at an in-depth exploration of the existing tools related to engagement approaches and strategies. Although limited material was available specifically on toolkits for mid-long-term sustainability. The search was expanded to examine toolkits built up and deployed by EU-funded energy projects. This involved searching for projects already known to the COMANAGE partners or sister projects like the synergic initiative done by [LIFELOOP](#) and systematically utilizing the [Energy Cities repository](#) to identify additional initiatives and projects. Insights from the projects analysed in the section 2.4. *Examples of engagement of Energy Communities, Citizen Initiatives, Public Authorities, and other actors* of COMANAGE *D3.1 OIS Hubs stakeholders' engagement and mobilization Plan* were considered during the development of the toolkit.

On a parallel level, **joint sessions with partners** were set in order to identify COMANAGE specific barriers and exploring possible solutions. In this sense, ECO and Co-opAbility arranged bilateral meetings with the three pilots to gather specific insights and requirements in every regional area. These sections were followed by specific working meetings on the toolkit specific components. Once wrapped, a preliminary presentation of the toolkit prototype was delivered to partners as part of the Consortium Meeting session in Athens, Greece on 28-30th June 2023.

The toolkit's dynamic exercise and final validation outcomes are showcased in this deliverable. COMANAGE partners were consulted to gather feedback and insights, ensuring that the toolkit effectively meets the needs of the COMANAGE OIS Hubs for tailoring the prospective tools. By following this methodology, the COMANAGE project aimed to create a comprehensive and tailored Energy Communities Governance Toolkit that addressed the specific needs and challenges of the pilot cases, fostering long-term sustainability and economic stability.

The different COMANAGE tools sought to offer practical solutions, methods, and ways to overcome the barriers found by COMANAGE partners, that were the final outcome of the following activities:

- A literature review needed for the deliverable *D2.2 Energy Communities barriers, needs and best practices analysis* to provide the project with a comprehensive and valid background.
- During the COMANAGE Kick-off Meeting (KoM), examples of ECs from different countries were presented within the space given to the OIS Hub, as part of a dynamic activity, in which partners identified the primary obstacles that ECs normally face.
- A set of qualitative interviews conducted by ANESE and ECO with experts in energy communities from Spain, Italy, and Poland with the aim of gathering practical information and knowledge of existent barriers and obstacles encountered during the different stages of an EC development.

The image presented below (Fig.2) illustrates the comprehensive range of barriers that have been identified. These barriers are categorized into **5 different sets**: Technical, Financial, Legal and Administrative, Participation, and Dissemination. Each set of tools within the project aimed to address and overcome the specific barriers associated with its respective category. By aligning with these categories, the tools highlight and prioritize the key factors to tackle every barrier within each subchapter. This approach ensures that the document accompanying the tools provides a clear and concise overview of the main barriers and the corresponding solutions proposed by each set of tools.



Figure 2. COMANAGE detected barriers

4. Toolkit Architecture

This section is focused on outlining the design and structure of the ECG Toolkit. As per its definition in the COMANAGE project, the toolkit is a comprehensive collection of tools, mechanisms, and services that have been designed to be flexible and adaptable. Its primary objective is to provide support to local and metropolitan government staff and Public Administration (PA) officials in effectively managing energy community projects. Developed as a central output of the COMANAGE project, the toolkit fully integrates with other key components within the COMANAGE Open Platform (COP), that is to say the Decision Support System (DSS), and the E-learning platform. Together, these interconnected resources create a cohesive digital environment where the three COMANAGE pilots, AMB, KMA and ANCI Lazio can digitally develop and implement their respective initiatives, expanding their network.

4.1. Toolkit integration within COMANAGE outputs

The ECG Toolkit within the project seamlessly integrates with the other tools and spaces available within the COMANAGE Open Platform, as illustrated in the Fig.3 below, that has been structured and designed by ECO and SPXL during several co-creation meetings. The main idea was to create a digital homogenous ecosystem in which all the COMANAGE outputs would be interconnected.

It is worth mentioning that during the implementation process, the project's pilot hubs did not perceive a clear added value in the use of the Digital Hub. Many similar platforms often remain underused, and the feedback received suggested that dedicating resources to its further development would not be the most efficient choice. Therefore, the consortium decided to discontinue dedicated investment in the Digital Hub and instead reallocate efforts towards strengthening other project tools that were found to be more useful and widely applicable. In particular, the Frequently Asked Questions section of the DSS, the DSS itself, and the OSS have proven to be more effective instruments for supporting public administration staff and citizens in resolving technical questions and facilitating the practical uptake of the project's results.

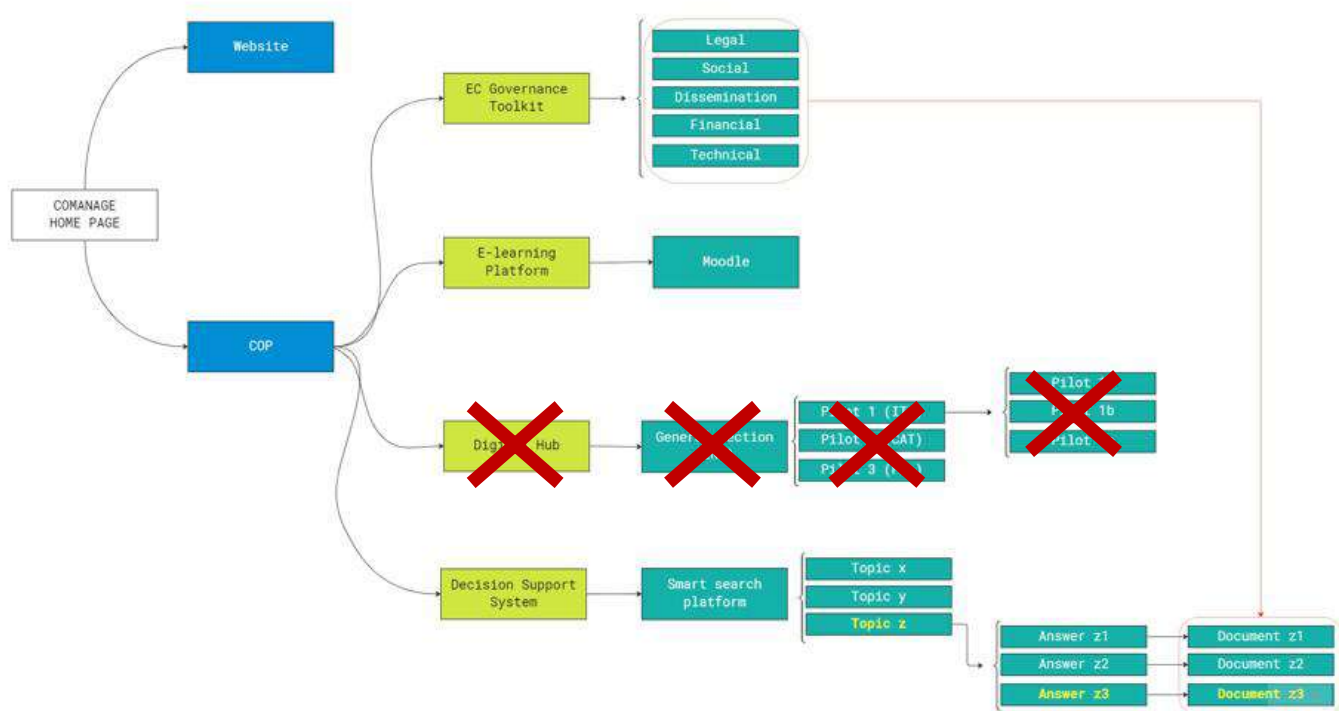


Figure 3. COMANAGE Webpage Scheme

This integration enables a comprehensive and coordinated approach in addressing the barriers identified at the outset of the project, which have been categorized into five distinct categories that follow in Fig.4.



Figure 4. Set of categories to group the tools included in the COMANAGE ECG Toolkit

The E-learning component, the ECG Toolkit, and the Decision Support System all share a common purpose and collectively tackle these barriers from different usage angles. The integration of the toolkit with the other tools and spaces ensures that the identified barriers are effectively addressed in a holistic manner. Each tool brings its unique set of functionalities and capabilities to bear on the challenges at hand, leveraging the insights and resources offered by the Open Platform. The E-learning component provides educational resources and training materials, equipping stakeholders with the knowledge and skills required to overcome the identified barriers.

The toolkit offers a flexible and adaptable set of tools, mechanisms, and services that support the management of energy community projects. Lastly, the DSS facilitates data-driven decision-making by extracting valuable information from the data related to the projects and provide information in the long term. By approaching the identified barriers from different perspectives while maintaining a shared purpose, the COMANAGE outputs collectively address the challenges comprehensively. This integration ensures a cohesive and synergistic approach, optimizing the impact and effectiveness of the tools in promoting the objectives of the project. Through this coordinated effort, the COMANAGE tools work together to overcome the barriers, foster sustainable practices, and drive positive change within the energy community projects.

4.1.1. COMANAGE Open Platform

The COMANAGE Open Platform (COP) is an interactive and dynamic solution for the different aspects related to the management of energy communities in the long-term. The COP, as shown in the Fig.5, is positioned as the primary entry point for the Hub Manager and all stakeholders. The platform aims to deliver tailored and translated content in **five main languages**: English, Italian, Polish, Catalan, and Spanish. The users will be automatically redirected based on their browser language settings, although they will also have the option to switch languages manually. The platform intelligently presents content according to the user's selected language.

The main components of the COP consist of the ECG Toolkit co-created by ECOSERVEIS, the pilots and Co-opAbility.

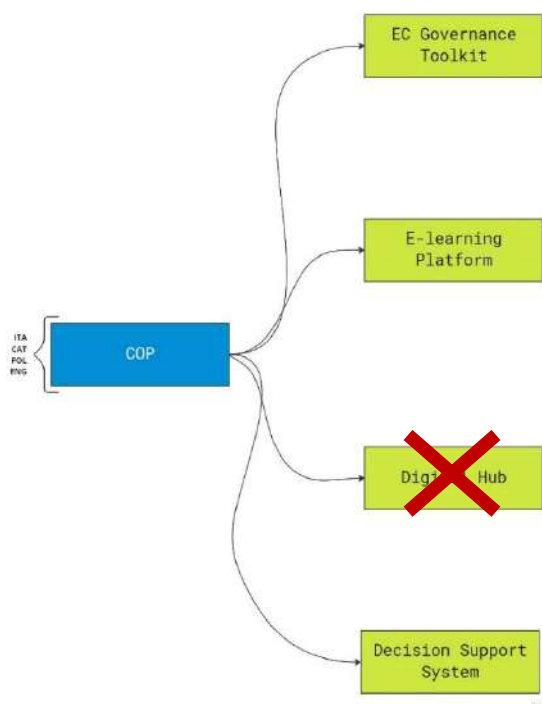


Figure 5. COMANAGE Open Platform Scheme

The E-Learning component, developed by AISFOR, offers educational resources and training materials. Lastly, the Decision Support System developed by SPXL, aiding users in making informed decisions through data-driven insights.

The platform is conceived as a solution that integrates and makes accessible information about the deployment of energy communities, go-to-guides, technical documents, online tools, connecting interested users with experts in the field and maximizing the impact of communication and dissemination activities.



Figure 6. Access the COMANAGE Open Platform in the different languages

4.1.2. DSS – Decision Support System

By leveraging the capabilities of the toolkit together, stakeholders can efficiently navigate the complexities of energy community management and make informed decisions that contribute to the success of their projects. The Decision Support System (DSS) is developed with the primary objective of providing support to policy makers by extracting relevant and valuable information from the data associated with the specific pilots. The DSS comprises several key components, including a database for storing the relevant data, data management tools for organizing and manipulating the data, and both back-end and front-end components to facilitate data processing and user interaction.

The users of the DSS are the public administration entities involved in the pilots and replicators, as well as citizens who access the system. The roles of ECOSERVEIS, AISFOR, Co-opAbility, and ANESE involve the selection of data and information to be incorporated into the DSS. The DSS operates on the principle of being an open platform, making it easily adoptable by other public administrations facing similar challenges. These administrations can customize and enhance it by incorporating their own information. Depending on the usage and requirements of the DSS, as well as the requests of the stakeholders involved, maintaining the DSS online beyond the project's conclusion is taken into consideration. This decision will be based on the system's continued relevance and value in supporting policy makers and addressing the needs of the energy community projects.

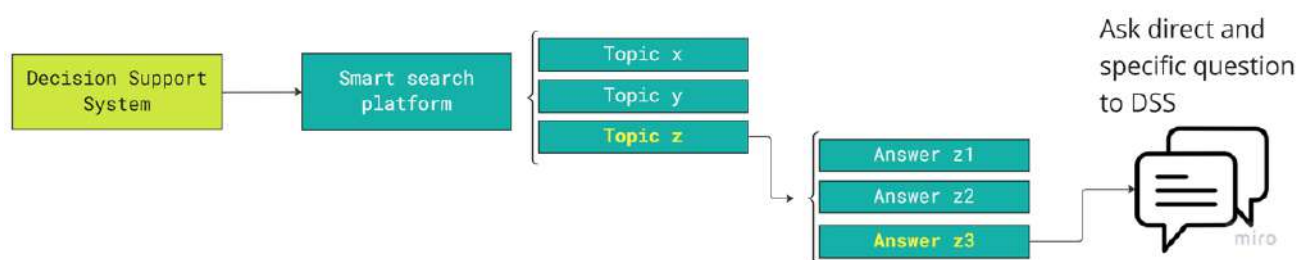


Figure 7. Decision Support System Scheme

To fulfil so, the DSS incorporates advanced techniques, such as Large Language Model (LLM) parsing, to handle large documents in multiple languages. It has the capability to analyse and process these documents, enabling it to generate responses and provide relevant links to the source document where the information is found. In this sense, in order to use the DSS, users simply need to upload the required documents to a shared folder. The system then automatically processes the documents and is able to respond to queries based on the information contained within them. However, there are certain constraints that must be considered. The documents need to be formatted as either PDF or text files, and any extraneous or irrelevant information, such as indexes or images, should be removed beforehand to optimize the system's performance. By adhering to these constraints, the DSS can effectively process the uploaded documents and provide accurate and useful responses to user inquiries that can be depicted as a long-term strategy.



Figure 8. Access to the COMANAGE Decision Support System

In the coming months, the DSS will undergo a refactoring of the methods responsible for storing and delivering the collected contents. The goal of this work is to enhance the way links embedded within file texts are managed, ensuring they are handled more efficiently and presented in a way that preserves their contextual meaning. By improving both the internal data

structures and the retrieval logic, the system will be able to generate responses that are not only more accurate but also richer in context, ultimately providing users with a smoother, more intuitive, and more relevant experience.

4.1.3. E-learning Platform: COMANAGE Energy Community Academia

The “**COMANAGE Energy Community Academia**” is a fully founded training program on renewable energy sharing that includes a generic English course and 3 pilot specific courses. The “COMANAGE Energy community Academia” refers to the combination of all four courses and is accessible at this link <https://comanage.aisforacademy.eu/> or through the dedicated button on the COP.

The COMANAGE Energy Community Academia identifies a common structure among all courses and includes “general lessons” (overall valid contents) and “pilot-specific lessons” (country-specific lessons). The general lessons were then attributed to the English language and constitute the English course. The pilot-specific lessons have been prepared only in pilot languages and, together with the translated general lessons, constitute the contents of the pilot training courses. Some of the topics which constitute the pilot-specific courses are strictly related to national settings, for instance incentives, sharing mechanisms, typologies of legal structures.

M1	Introduction
M2	Technical
M3	Financial
M4	Legal & Administrative
M5	Participation & Dissemination

The training is structured on the same sections in which the ECG Toolkit is divided. As a matter of fact, the COMANAGE Energy Community Academia includes 5 modules:

- **M1:** Introduction to energy communities
- **M2:** Technical area
- **M3:** Business and financial area
- **M4:** Legal and administrative area
- **M5:** Participation and dissemination area

A presentation of the different pilot tailored tools is included in the corresponding module of the training and serves to provide attendees with practical skills to be directly applied in their local context.

Figure 9. E-learning modules structure



Figure 10. Access the COMANAGE E-learning Platform

4.1.4. Energy Communities Governance Toolkit

The main goal of the Toolkit is to offer mechanisms and integrated services to support citizens and local and regional governments with the necessary tools to manage energy community projects. It is organised into five categories, providing essential resources for different aspects of development and management, tailored to the languages of each pilot (Catalan, Polish, Italian, and Spanish).

Section 5 describes each of the different tools included in the ECGT, detailing their main objective, structure and how it was tailored to the specific pilot's context.



Energy Communities Governance Toolkit categories

Technical

Created to support the implementation of all **technical** aspects of energy community projects, including **step-by-step processes** for energy community members to follow when engaging in shared self-consumption, and **templates** to provide a **structured approach** to setting up and operating these systems.

OPEN

Financial

This category guides users through the **financial steps** required to ensure the sustainability of energy communities, including a **"how-to" guide** focusing on multiple scenarios, cash flow and stakeholder identification. Energy communities can **systematically analyse their financial aspects**, identify potential risks and ensure that the business model is **economically sustainable**.

OPEN

Dissemination

Materials tailored to **effectively disseminate** energy communities, raising awareness among the general public and stakeholders actively involved in the energy sector. This section contains a **video package** and **ready-to-use materials** designed to inform about the practical aspects and principles behind energy communities, and to **inspire viewers** to get involved and actively contribute.

OPEN

Social

The **social** category brings together the formula for a long-term, growing and sustainable strategy to **amplify the voices** of community members, facilitate inclusive dialogue and encourage active engagement. It includes a list of **10 DIY rules**, a **participation plan** and a plan to tackle **energy poverty**.

OPEN

Legal

Legal templates developed to facilitate the creation of **public-private partnerships**, ensuring the support that energy communities need for successful development, implementation and long-term sustainability. This category includes information on the establishment of **legal entities**, internal **regulation**, private rooftop **leasing** and municipal **tax incentives**.

OPEN

Figure 11. Access the COMANAGE Energy Communities Governance Toolkit

5. Social participation tools

The social participation tools aim at **enhancing the engagement** of people with an intersectional and inclusive perspective. As a matter of fact, as far as gender equality related objectives briefly highlighted in the Gender Mainstreaming in deliverable *D2.1 Energy communities' holistic framework and collaboration methodology*, the tools proposed in this section are intended to enhance participation in energy community projects, motivating individuals, and collectives to become active and promote a modern and sustainable model, getting in touch with other people. Their goal is to address the barriers that have been identified by COMANAGE partners in a preliminary phase of the preparation of the toolkit.

At the general level, these tools are designed to assist at the medium and late stages of the project, although they can be tailored also in an early stage. Rather than offering a single definitive answer to the question of how to ensure the longevity and sustainability of an Energy Community, the goal is to guide ECs towards a long feasible and viable lifepath from a social perspective. That is the reason why the tools provided offer general guidelines, examples, and recommendations to help ECs in Europe navigating the whole process effectively. These tools have the following objectives to address the identified barriers:

1. Provide frameworks, methodologies and more practical examples that help members in engaging and collaborating at the community level, empower them to overcome the **initial lack of experience** while actively contributing to decision-making and bottom-up actions within the community.
2. **Enhance knowledge sharing and capacity building.** The workshops and sessions equip participants with the information, skills, and competences they need to engage in discussions with other stakeholders, understand and explain technical aspects to become active subjects.
3. As for the **lack of trust in other actors or processes**, the tools foster a higher sense of transparency, inclusivity and accountability that can help to establish trust, while enhancing genuine commitment.
4. Concerning the possible **difficulties in engaging specific social segments**, like females and young adults, the tools incorporate communication strategies such as digital channels to engage a young public or methods like the mailbox that help promoting safe spaces for expressing ideas or opinions or concerns when an individual for gendered roles and specific social structures does not feel legitimised to talk.

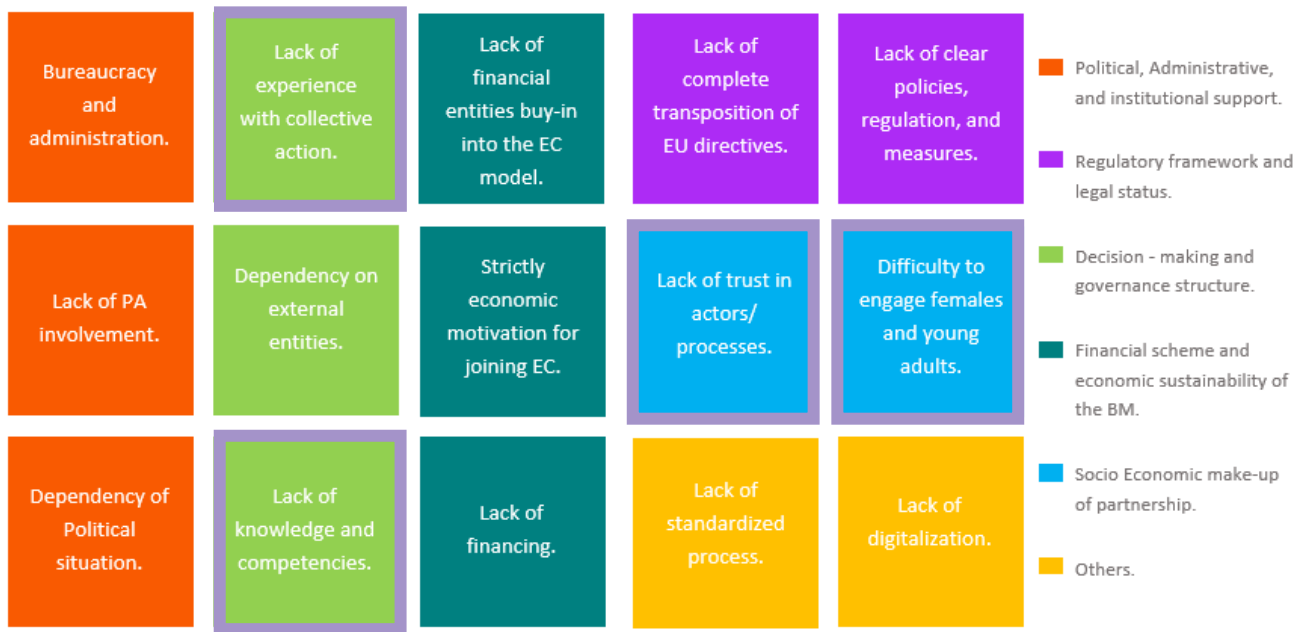


Figure 12. Selection of barriers for the social participation tools

5.1. DIY 10-rules-list for equality, inclusion, and intersectionality in participation

The DIY list is a set of [10 rules or guidelines that energy communities can use](#) to manage various aspects of their internal organisation and external relations effectively and proactively. The primary objective of this decalogue is to provide energy communities with a framework that enables them to thrive and sustain their operations in the long term, while ensuring inclusion and fostering social participation.

The decalogue serves as a practical and accessible guide for individuals within energy communities and PA involved in energy transition initiatives to navigate or give support to various aspects of their internal organisation and external relations. Every rule highlights a necessity that must be addressed, and any individual can use the decalogue by following the 10 rules outlined within it from start to finish or selecting those that can specifically target a need. Each rule provides specific guidance and recommendations on how to address different challenges and promote sustainable practices within the community. To use the decalogue effectively, community members can start by familiarizing themselves with the rules and their description and then with the specific content (herein provided in the coloured boxes), which provide more detailed explanations on the activities/actions to make. They can carefully read and understand the principles and actions suggested by each rule, considering how they can be applied to their specific context.

The toolkit highlights general guidelines and provides examples of methodologies, such as the **Mailbox** or **Social Media channels**, presented in the coloured boxes. These examples can be easily tailored and modified to align with the specific characteristics and requirements of the energy community. Variations in behaviours, cultural patterns, and socio-economic dynamics among different social segments may need adjustments to ensure the effectiveness and relevance of the tools within the diverse contexts.

5.1.1. Main objective

This tool has been designed with the goal to contribute to **increasing inclusion and gender equality** within energy communities in several ways. Firstly, by providing a decalogue of 10 rules specifically designed to guide the internal organisation and external relations of energy communities, it ensures that all community members, irrespective of gender, have equal access to information and resources necessary for their active participation and decision-making. The tool promotes transparency, accountability, and fair practices, fostering an inclusive environment where all voices are heard and valued.

Moreover, the tool explicitly addresses gender-related barriers and biases that may exist within energy communities in rule 8 or focuses on promoting equal opportunities for leadership and participation in decision-making processes. By emphasizing gender equality as a key principle, the tool encourages energy communities to actively **identify and eliminate discriminatory practices** and create opportunities for women's involvement at all levels.

The lack of specificities in this section of the toolkit is justified by the fact that the structure of COMANAGE social participation tools is primarily based on best practices and dynamic exercises that require minimal economic resources. The intention is to provide a flexible framework that can be adapted to different energy communities and their unique circumstances from an organisational and economic point of view.

5.1.2. Structure of the tool (Format, features & target audience)

The intended users of this tool are **civil servants** supporting **members of energy communities** or the latter themselves who aim to acquire knowledge on how to deploy a sustainable long-term strategy for their community's development. The tool has been designed taking into consideration the perspective of an EC representative or energy project promoter, a governing structure or a civil servant supporting already established energy communities within his/her municipality.

This [decalogue](#) is typically presented in an online format, to which users can access through the COMANAGE Open Platform. There is a general image, containing all 10 rules in the form of a visually appealing **poster**, which could also be prominently displayed in public administration offices and public spaces where energy community members can easily access it. Then, users can click on each of the rules through the COMANAGE Open Platform to get additional information and tips to apply each rule. Initially, **leaflets** containing more detailed explanations of each rule were considered alongside the poster; however, they were not implemented to avoid waste of paper. By following these guidelines, energy communities can navigate challenges, optimise their internal processes, foster strong external relationships, and ultimately achieve long-term success in their endeavours. Furthermore, it is considered that the distribution of the DIY list posters in public administration offices and public spaces ensures that the information reaches a diverse audience, including individuals who may have limited access to digital resources. This approach helps overcome potential barriers to inclusion, such as technological or digital divides, and ensures that marginalised groups, including women, have equal opportunities to engage with the tool's content.

As per the specificities of the tool, the 10 rules are outlined and described in the following pages. The coloured boxes contain further clarifications, examples, practical exercises and dynamic activities. The main idea is that these are guidelines that can be deployed, taking into consideration the **Theory U tools** and main dynamics. As for the high degree of flexibility and customisation, the importance of addressing the specific needs and dynamics of each energy community is acknowledged.

Nevertheless, variations in approaches and strategies can occur due to cultural, social, and economic factors. Therefore, communities are encouraged to adapt their tools to maximise impact and effectiveness.



10 DIY rules for equality, inclusion and intersectionality in participation

[English](#)



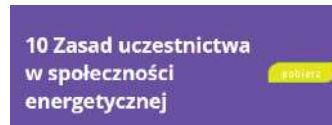
10 propostes per la igualtat, la inclusió i la interseccionalitat en la participació

[Catalan](#)



10 regole fai da te per l'uguaglianza, l'inclusione e l'intersezionalità nella partecipazione

[Italian](#)



[Polish](#)



10 propuestas para la igualdad, la inclusión y la interseccionalidad en la participación

[Spanish](#)

Table 1. Access the 10 DIY rules for equality, inclusion and intersectionality in participation

1. FIND A COMMON GROUND FOR SHARED VALUES AND GOALS



As also COMANAGE theoretical framework outlined by Theory U in deliverable *D2.1 Energy communities' holistic framework and collaborative methodology* pinpoints, establishing a foundation of shared values and goals is a fundamental aspect within a group or community. When dealing with equality, inclusion and intersectionality, the common ground involves identifying and emphasising the commonalities that unite individuals or stakeholders, no matter their diverse backgrounds, beliefs, identities, experiences, or perspectives. By focusing on shared values, such as fairness, justice, and respect, and eliminating discrimination and biases, a sense of collective purpose and belonging can be fostered.

This may involve discussions, **world cafes**, or facilitated sessions to uncover the underlying values and principles that drive individuals' commitment and shared vision to inclusion, aligning efforts and building trust.

2. "Knowledge is power". CREATE A SAFE SPACE TO SHARE INFORMATION



To create a safe space for sharing information, it is important to establish a hospitable environment that encourages open dialogue and comfort, allowing that information is shared in a manageable and easy to understand way, adapted to the specific public. (i.e., different languages, education levels, social roles, computer literacy.) This involves the following aspects:

- Choose a physical environment that is cosy and conducive to open discussions.
- Avoid a classroom or conference room setting and instead opt for a meeting place with tables accommodating four to five chairs (maximum). Provide butcher or flipchart paper, coloured markers, post-its, and other materials for participants to engage in interactive activities.
- The host(s) welcome(s) participants as they arrive, creating a warm and inviting atmosphere.

- She/he/they clearly communicate(s) to participants that they are encouraged to speak their minds without fear of judgment, stressing that there are no right or wrong answers or comments, fostering an environment of inclusivity and respect for diverse opinions.
- Provide regular community events (e.g., workshops, town hall meetings, webinars) to educate community members about energy related topics, providing them with soft skills that enhance interpersonal interactions and teamwork (e.g., effective communication strategies, approaches to collaboration, and fostering inclusivity).

One of the best practices that has been found out in this specific field of action is the creation of communication materials to effectively communicate energy knowledge. In this section, the work done by the Community Energy Academy¹ briefly presented in Fig.13.

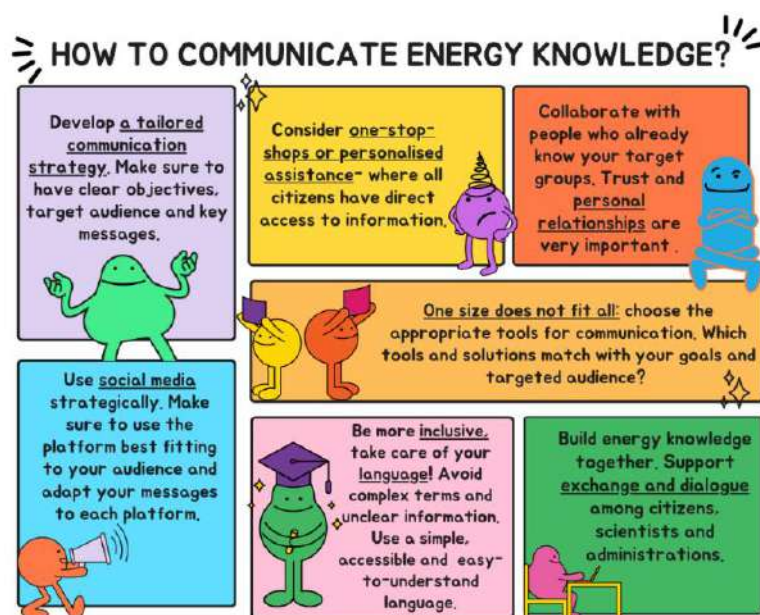


Figure 13. Checklist: how to communicate energy knowledge

3. USE NONVIOLENT, ASSERTIVE, AND INCLUSIVE COMMUNICATION CHANNELS



The individuals belonging to an energy community might be able to express themselves in the most comfortable way. To this aim, clear and diverse channels of communication and feedback are fundamental in order to ensure that community members feel heard and valued. Sometimes, in community gatherings some individuals have more impact than others, as for their expertise on the subject, or because of their communication style, age, ease of speech in public, etc. This can lead some individuals to avoid sharing their feelings, ideas, and opinions. Hence, it is important to ensure that everyone has the chance to express their views. To address this, a **mailbox** can be introduced as a tool for post-assembly communication.

¹ More information available at the [KNOWLEDGE module: Integrated knowledge and information for energy communities and citizens](#)

- The **mailbox** allows participants who didn't speak during the meeting to have a platform where their inputs, feedback, ideas, concerns, or questions can be received and considered.
- It can be designed to accept also anonymous feedback or include an option for individuals to provide their names. The feedback must be handled with confidentiality and respect in order to foster trust and avoid judgmental conducts.
- It can be a physical box in which to leave written notes, or also an online platform (e.g., Google Form) for online submissions.
- During the assembly/meeting, it's important to inform participants about its existence and purpose. Emphasise that it is a tool available for those who may have hesitated to speak during the meeting or who have additional ideas or questions they would like to share.
- The feedback sent through this tool should be regularly reviewed by designated individuals or a committee responsible. Depending on the specific topic/request/query, responses can be provided in the next meeting or through alternative communication channels, such as email or newsletters.

4. “Sharing is caring”. FOSTER PARTICIPATION AND INCLUSION OF DIFFERENT SOCIAL GROUPS IN ALL THE ACTIVITIES, ACTIONS, AND DECISIONS.



When dealing with the design of a participation plan for long-term sustainability, casting light on the importance of not leaving anyone behind is very important. Use social media and other outreach and communication tools to provide more flexibility with those members who might not otherwise physically participate for family or working related matters. Participation and inclusion of those who are more affected by energy poverty and those collectives who are more invisible and underrepresented in the field of energy, like racialised people, the elderly, or youngsters, need to be strengthened. When considering the challenges faced by vulnerable collectives or underrepresented groups (e.g., stigma, lack of willingness, language-related stressors, energy poverty-related stressors, mistrust, socio-economic situation, and unbalanced private/working life schedule) it is crucial to make some considerations (as it is also mentioned in the Gender Mainstreaming Chapter 5 of deliverable *D2.1 Energy Communities’ holistic framework and collaborative methodology*).

- With individuals who suffer **social stigma**, as defined by Goffmann (1985), it is important to adopt an approach that prioritises safety, trust, and empowerment. This involves creating a supportive and non-judgmental environment that acknowledges and addresses the impact of past experiences.
- Ensure that every communication is done taking into consideration **language** and **cultural diversity**. In case the municipality provides cultural mediation, it can be considered to solve language related issues and give tips on effective communication.
- Offer flexible formats for engagement (e.g., virtual meetings, recorded sessions, or digital communication channels), to accommodate the socio-economic situations and lack of time of the target groups. This allows individuals to participate at their convenience and reduces barriers related to time constraints.

5. BUILD UP A STRONG, INCLUSIVE AND DEMOCRATIC GOVERNANCE



Every Energy Community has a power structure and dynamics that are made visible through the organisation chart and internal governance system, which defines duties and responsibilities, the distribution of tasks and how decisions are taken. This structure, although in energy communities and specifically in energy cooperatives, tends to be more horizontal or slightly different from commercially oriented enterprises, may be vertical and hierarchical, or horizontal. However, it is fundamental that all the related aspects are clear, consensus-based, and known by all the individuals who take part into it.

- Every organisation also has an invisible power game, which is more dynamic and harder to correct in case of bad practices.
- Providing transparent and easy to understand rules of the game, enables higher commitment and contribution from members, new members interest and engagement and a general sense of belonging.
- Establish clear rules and procedures for decision-making and ensure transparency in the governance structure of the energy community project. This allows for greater accountability and inclusivity in the decision-making process.

6. PROMOTE SHARED RESPONSIBILITY AND JUST ASSIGNMENT OF TASKS AND DUTIES



When engaging citizens, it is important for groups to strike a balance between structure, responsibilities to be accountable for, and goals to address. Establishing clear rules and procedures for decision-making and ensure transparency in the governance structure of the energy community project is fundamental as it allows for both accountability and inclusivity. According to the feminist sociologist Jo Freeman (1970), any project can fail if there is no clear assignment of tasks and shared responsibility. The author sheds light on the idea that a structureless group can be harmful as power relationships are inevitably generated. Hence, when defining the governance structure/hierarchy, common values, mutual care, and respect may facilitate the participation of all members of the community.

- Create specific committees or working groups to address the different issues rising, based on expertise or specialties (coordination with other stakeholders, publicity, membership, outreach activities and/or fundraising).
- The whole group should participate in the deliberation process and in the selection of members of committees and working groups. If the whole group is confident in the fact that every selected committee can make the best choices for the whole community, a decentralized governance can be established. This would allow and empower the different committees to make most decisions and then regularly reporting back to the EC.

7. EMPOWER CITIZENS IN DECISION MAKING PROCESSES



Specifically, within the field of energy communities, some features can help to build up a democratic governance scheme: inclusive decision-making spaces; mechanisms of democratic control; inclusive structures; and energy justice. An example of a mechanism of democratic control in a community project is through the establishment of **regular general assemblies or community meetings**, that serve as a platform for community members to come together, discuss important matters, make

decisions collectively, and be accountable for the whole project. During the assemblies, community members could voice their opinions, ask questions, and contribute to the decision-making process.

- Assemblies are a mechanism that ensures *transparency, inclusivity, and responsiveness* to the needs and aspirations of the community members.
- The use of a **voting system** can be employed to ensure that decisions are made collectively and reflect the majority's will.

8. WORK FOR REDUCING GENDER GAP AND PREJUDICES/STEREOTYPES



When dealing with gender equality and social inclusion it is important to focus on the efforts and initiatives aimed at addressing and eliminating inequalities, biases, and stereotypes based on gender within a community. It involves taking action to promote activities aimed at making individuals understand specific needs, characteristics and situations that different males and females face based on gender as social construction in terms of equal opportunities, rights, and treatment. Among the groups dynamics that can be used to enhance it, the COMANAGE gender mainstreaming activity used during the Consortium meeting in Athens can be useful. The layout of the quiz is provided in the Annexe.

Proposed activity: **COMANAGE “Exploring our Gender Perceptions” dynamic activity.**

Objective1: check basic knowledge of the respondents of the main concepts included in the Gender Mainstreaming chapter inside deliverable *D2.1 Energy communities’ holistic framework and collaborative methodology*.

Tool: Provide the link or a printed copy of the **quiz**

Duration: Approximately **5 minutes**.

Objective 2: Foster reflection and discussion about gender perceptions and how they can influence our daily interactions, promoting greater understanding and awareness of gender equality.

Activity: Group dynamic

Duration: Approximately **40 minutes**.

Materials needed:

Blank sheets of paper.

Pencils or pens for each participant.

Whiteboard or large paper for noting down ideas.

ACTIVITY STEPS:

Introduction (5 min)

Explain the purpose of the activity and the importance of promoting gender equality within the group (deliverable *D2.1 Energy communities’ holistic framework and collaborative methodology*)

Emphasize that this activity is a safe space for sharing opinions and experiences, and that respect and active listening are encouraged.

Individual Exercise: "My Gender Expectations" (10 min)

Ask each participant to take a sheet of paper and write down 3 gender stereotypes they have personally experienced or observed in the workplace/within a project.

Encourage participants to be honest and reflect on how these stereotypes can impact gender equality within the team.

Small Group Discussion: "Sharing Our Experiences" (10 min)

- Divide participants into groups of 3 or 4 people (balanced gender representation within each group)
- Instruct the groups to share the gender experiences or stereotypes they wrote down and have each group member share an experience related to them.
- Encourage active listening and respect for different perspectives.

Whole Group Sharing and Reflection: "Putting yourself in someone else shoes" (15 min)

Invite each group to briefly share the gender stereotypes they discussed, and the experiences shared.

Set Role-playing game: a male and a female per group will exchange roles.

Note down key ideas on the whiteboard or large paper.

Facilitate a whole group discussion to reflect on how these stereotypes can impact gender equality within the team and the European project.

Encourage participants to propose potential actions for fostering gender equality within the team and discuss how they can be implemented within the project.

Conclusion (5 minutes): keys to work with in our pilots.

Summarize the main ideas discussed during the activity.

Thank everyone for their participation and emphasize the importance of working together to promote gender equality.

9. PROMOTE INCLUSIVE AND JUST INTERNAL POWER DYNAMICS



Promoting inclusive and just internal power dynamics in a citizen-led and participative initiative involves ensuring that decision-making processes are equitable, and fair and that the whole range of perspectives are valued. On the other hand, when dealing with a deliberative and more horizontal structure, power must be shared among all participants. A dynamic exercise is proposed herein.

Proposed Dynamic: Circle of Voices² is a small-group exercise, designed to secure participation of all members in a class, in a meeting or staff development training, workshop, or any other group event in which decisions must be made (approx. 30 mins)

- Form a circle with the participants or stakeholders.

² More information available at:

http://experience.uwo.ca/pdfs/faculty_resources_and_examples/Circle%20of%20Voices_UpdatedFooter.pdf

- Explain the purpose of the exercise: to provide an opportunity for everyone to share their thoughts and perspectives on a specific topic or issue.
- Pass an object, such as a talking stick or ball, around the circle. Only the person holding the object is allowed to speak, while others actively listen without interruption.
- Pose a question or topic related to the topic or the decision to be made.
- As the object is passed around, each participant has an opportunity to share their thoughts or experiences on the topic. Encourage everyone to speak, ensuring that quieter voices have a chance to be heard.
- Facilitate respectful and active listening, emphasizing the importance of valuing and respecting diverse viewpoints.
- Once everyone has had a chance to speak or when the discussion feels complete, reflect on the insights shared and identify common themes or areas of agreement.
- Encourage participants to think if their perspectives shared during the exercise in future decision-making processes to ensure inclusivity and fairness.

10. PROMOTE COOPERATION AND PARTNERSHIPS WITH STAKEHOLDERS TO EXPAND THE REACH AND IMPACT OF THE EC.



Considering the social ecology of an EC and involving stakeholders is crucial for ensuring its long-term sustainability and success as it brings diverse perspectives, expertise, and support, fostering ownership and commitment that are essential for project longevity. This inclusive approach fosters a strong network, innovation, and shared responsibility, leading to resilience, adaptiveness, and sustainability.

- Always engage with Local Authorities in order to establish supportive policies, regulations, incentives for energy communities and facilitate access to resources and funding.
- Engage with ethical banks, or financial institutions promoting just and fair projects to develop financial products and services tailored to the needs of energy communities.
- Seek partnerships with local businesses and industries related to energy production and consumption to foster economic development and support the transition to a different and just model.
- Join local, national, or international networks and alliances of energy communities, CSOs or NGOs actively working towards similar goals as they can help to improve capacity building, and advocacy to drive policy changes and promote the scaling up of energy community initiatives.
- Involve schools and recreational centres of social life as they can promote awareness among population and can be a catalyser and a replicator.

5.1.3. Tailoring needs

Concerning the tailoring needs of the Decalogue, since it serves as foundational guidelines and basic rules to assist energy communities in shaping their own structures and determining courses of action, the general principles outlined in this document allow for customization based on the specific needs, context, community environment, target groups, and participation dynamics of each Pilot. Therefore, due to its generic approach, the Decalogue does not require pilot tailoring, however, it does allow for customization if needed. The only tailoring done, was translation to local languages, Catalan, Italian, Polish, and Spanish.

5.2. Participation Plan

Energy communities constitute an opportunity to build solidarity within socially unequal environments and contexts. Members, as driving forces of these communities, must take several decisions to initiate projects that aim social justice. Nevertheless, limitations, lack of knowledge, different priorities, and unequal privileges pop up along the way. The **Participation Plan** aims to address the needs of the diverse collectives composing ECs and promote their visibility and engagement, fostering inclusive growth and collaboration.

5.2.1. Main objective

This tool was developed using a **bottom-up approach**, placing active participants, that is to say energy communities' members, at the forefront. As for the DIY list, the idea herein is to **promote collective reflection** on topics such as conflict resolution, community building, and collective empowerment. With this tool participants become active contributors and agents of change within the community, empowering them in decision-making, uniting the community. The plan, as it embeds inclusivity and accountability, also might help at generating a higher level of trust and communication among members, ultimately fostering a sense of shared ownership, and belonging.

The list of aspects below has been elaborated taking into account also the DYI 10-rules-list, that is conceived as a programmatic guide and that can be refined according to specific needs and stages of life of the EC. Within some of the aspects some questions are included in order to narrow the topic or matter.

1. **Definition and commitment to a shared mission, vision, and values**
2. **Strategies for a long-term development and growth**
3. **Governance and leadership**
 - a. How do you make these decisions? What leadership does the EC promote?
4. **Internal organization**
 - a. How do you organise you EC effectively? Who is the EC representing? Who is being excluded?
5. **Celebrate success internally and show externally the sense of belonging.**

- a. Sharing stories of positive impact, and highlighting the contributions of individual members

6. Conflicts Resolution

- a. How do you approach conflict and how what kind of conflict resolution do you implement? As highlighted in the co-design sessions of the three OIS Hubs, Co-opAbility, based on its experience with cooperatives, defined the Transformative Scenario Planning as the theoretical framework that better fits conflict resolution in the field of community projects as it implies:
 - i. different stakeholders, including marginalised social groups, engaged in the scenario creation process.
 - ii. a wide range of viewpoints and narratives to capture the social complexity and diversity of the issue to challenge dominant narratives and explore alternative ways of action.
 - iii. a transformative change by challenging existing identities (gendered roles), power structures, norms, and behaviours.

Transformative Scenario Planning (TSP), as described by Kahane (2012) aims to empower individuals who seek to collaboratively shape the future in a transformative way rather than simply adapting to existing circumstances. *“It involves a profound change, comparable to a caterpillar transforming into a butterfly, rather than incremental or temporary adjustments”*. This transformation occurs through reshaping our thoughts, actions, and relationships with others. While traditional scenario planning focuses on understanding the future, TSP takes a different approach by embarking on a transformative journey and constructing scenarios with the intent of influencing, shaping, or eventually effecting changes in the future. Although the concept is easy to understand, learning a specific series of steps while also embracing a profound shift in how we engage with one another and the situations we encounter is needed.

Identify and address barriers that may hinder social participation, such as *language barriers, cultural differences, or lack of awareness*. Take proactive measures to overcome these barriers and ensure that all community members have an equal opportunity to engage in the project.

So far, pilot projects or initiatives in the field of energy communities have been launched by municipalities to allocate benefits coming from PV installations to individuals in vulnerable situations. These individuals are selected and assisted by the Social Affairs Department of the municipality through a financial contribution or a reduction of the energy bills. However, following the COMANAGE rationale of a long-term sustainability and growth of energy communities, the main scope is to help them to be socially transformative actors fostering a sense of belonging among the communities involved, rather than merely serving as an assistance-oriented tool.

To translate this participation plan into a real and factual experience, the activity in the box below is proposed.

Proposed dynamic: **SOCIAL PARTICIPATION ACTIVITY**

Participation and Governance to Address Vulnerabilities: The Role of Energy Communities (45 min)

Context and brief introduction (5-7 minutes)

Energy Communities share the common goal of ensuring that the energy transition does not leave anyone behind. But who are these "left behind" individuals? In a general way, that means that the whole population should benefit from the new ways of managing and producing energy, particularly within energy communities. However, what happens when these innovative energy management approaches require activism, collaboration, and organization?

Explanation of the activity: (5-7 minutes)

The main idea of this activity is to share concerns, challenges, learnings, and ideas on how to make the energy community more diverse, inclusive, supportive, and operationally functional.

Team work on "Challenges and Proposals": (20 minutes)

The activity will be deployed in groups with 4-5 individuals. Sit close to people you are not familiar with, or at least with those you know the least. The idea is to perform two consecutive tasks and then share the outcomes. The goal is sharing learnings and different perspectives following the steps below:

The first collective challenge is to identify, within 5 minutes, **4 social profiles** in your surroundings you would like to involve in the energy community. However, you are not sure on how to do so. Which social profiles do you consider vulnerable? When discussing an inclusive energy community, who do you think might be excluded? Once you have identified them, two main options are possible:

- One person from each group will notify the moderator the profiles selected, and the moderator explains to the rest of the audience the choices done.
- A person per group will highlight the main findings of her group, expressing how the group worked through the profile identification and the feelings/impressions shared.

Example of social profiles (Elderly living alone, Unemployed people, Single mothers, Racialised people)

An energy community encompasses a diverse range of challenges that imply a set of questions to answer:

1. The first is **information**: reaching people and ensuring they understand the concept. The entry point should make individuals feel welcome and comfortable. *How can we make them feel comfortable? - How can we reach out to them? (Information - messages)*
2. Another challenge is **engagement**: *What benefits does the energy community provide to them?*
3. Followed by **participation** even in **economic terms**: *What type of participation do we desire? - What specific obstacles do they face in participating? - How can we facilitate their participation?*
4. Internal **governance** should also be addressed. *How should it be structured? What do they contribute to the energy community? What are their limitations in contributing?*

Task: A challenge will be assigned to each group, which will choose one of the identified social profiles to explain a challenge and how to overcome it. See the matrix in **Annex**.

Conclusions: (12-15 minutes)

The different teams explain the outcome of the ideas shared and what possible actions they see feasible for the specific targeted population analysed.

5.2.2. Structure of the tool (Format, features & target audience)

The Participation Plan primarily focuses on citizen-led ECs. Additionally, civil servants and policymakers involved in such initiatives or directly providing support to the deployment of energy communities in their territory can also benefit from the tools provided, as they seek to encourage participation and facilitate community development within their respective domains. This tool is a digital tool that is available in the COMANAGE Open Platform.



Table 2. Access the Participation Plan for Energy Communities

5.2.3. Tailoring needs

Concerning the tailoring needs the Participation plan included in the toolkit, it allows for customization based on the specific needs, context, community environment, target groups, and participation dynamics of each Pilot. Specifically related to participation and inclusion the participation plan should be implemented according to the diverse population and cultural norms of the specific region, considering the following aspects:

- Adapt and translate it into the language to ensure comprehension and accessibility, and symbols used, avoid cultural stereotypes.
- Consider literacy levels and provide alternative formats or channels such as audio, tutorials, or any visual materials to facilitate understanding.
- Provide different options of participation, such as group discussions, or online platforms, to allow for personal flexibility and comfort.

- Modify participation methodologies to align with local practices and models.

Even though some specific tailoring actions were initially foreseen, after implementing the tool, for the COMANAGE pilots the only tailoring done, was translation to local languages, Catalan, Italian, Polish, and Spanish.

5.3. Energy Poverty Tackling Plan

Recognising the significant role of Energy communities in driving the energy transition, it is crucial to leverage them as a means to address and alleviate energy poverty. Energy communities must prioritise the inclusion of energy poverty considerations from their inception, tailoring their business models to effectively tackle this issue. The project has identified four distinct levels of impact that can guide the development of strategies:

1. Implement a **reduced fee system** to enable vulnerable households to access essential services, such as shared self-consumption of photovoltaic energy.
2. Establish a comprehensive **training and communication program** aimed at empowering vulnerable households, providing them with the knowledge and skills necessary to actively engage in the energy community.
3. Introduce mechanisms to **include vulnerable households into the governance structure** of the energy community, ensuring their voices are heard and their needs are represented in decision-making processes.
4. Develop and implement necessary mechanisms to actively **promote the participation** of vulnerable households in the energy community, such as targeted outreach initiatives, financial incentives, or specialised support services.

The [Energy Poverty Tackling Plan](#), based on the previous experience in other projects of Ecoserveis, working with vulnerable collectives in the energy field, is foreseen as a guide that can take into consideration the best practices coming from grassroot work done with vulnerable collectives in different fields of action. This plan foresees key actions to tackle and approach energy poverty. Among the aspects that might be addressed, the following are considered essential at the macro level to develop a tailored plan.

- How to define **eligibility criteria** to access the ECs
- How to define **percentage of vulnerable** individuals/households living in the ECs
- How to reach **vulnerable households**
- Extent of the action
- **EC governance**: how to address the access credit to become a member
- Which **actions** does the EC, as change agent, take **to mitigate energy poverty** both inside its community and towards the other stakeholders?
- **Training and informal education**
- **Lobbying activities** and social activism around the right to energy, just transition
- **Counselling**

5.3.1. Main objective

The Energy Poverty Tackling Plan overcomes several barriers that hinder the effective addressing of energy poverty in existing energy communities. Firstly, it tackles the **lack of strategy** by introducing a comprehensive framework that outlines specific measures and actions dedicated to combating energy poverty. This ensures that addressing energy poverty becomes an integral part of the energy community's objectives. Secondly, the plan **addresses exclusionary practices** by emphasising inclusivity and expanding the scope of engagement beyond financial aspects or technical solutions. It actively promotes the participation of energy poverty households in governance and decision-making processes, recognizing their valuable insights and contributions. Thirdly, the plan addresses **knowledge and resource gaps** by implementing tailored training and communication programs for energy poverty households, equipping them with the necessary knowledge and resources to actively engage in shaping the energy transition. Lastly, the plan tackles **limited representation** by establishing mechanisms that ensure meaningful representation of energy poverty households within energy community governance structures, enabling their voices to be heard and their needs effectively addressed.

5.3.2. Structure of the tool (Format, features & target audience)

The Energy Poverty Tackling Plan, like the other two tools, is designed to provide clear and practical information to energy communities seeking to address energy poverty and promote diversity and inclusivity. It offers a concise format with specific models that can be easily implemented. The plan focuses on the key features and also main matters inside the governance of an EC, briefly outlined above, that once implemented could enable effective participation of energy poverty households and ensure their representation in the governance structure of energy communities. These features include:

A reduced fee model/template that provides a reduced fee to enable vulnerable households to access essential services within the energy community.

- How to do it: decide clear guidelines on how to calculate and apply the reduced fees, along with examples of successful implementations in other communities or fields of action. *(e.g. in order to avoid the weight, despite the reduced fee, providing different paying instalments).*
- Benefits: This model provides immediate financial relief to energy poverty households, allowing them to access services such as PV shared self-consumption at an affordable cost.

Training and Communication Model focusing on empowering vulnerable households through comprehensive training and communication programs or activities.

- How to do it: Step-by-step instructions on designing and implementing training, including topics to cover, training methods, and available resources. *(e.g. how to moderate or facilitate a session following the trainer of trainers' method)*
- Benefits: Empowering energy poverty households with knowledge and soft skills.

Governance Inclusion Model that aims to include vulnerable households into the governance structure of ECs, ensuring their voices are heard and their needs are fully represented and taken into consideration.

- How to do it: Guidance on establishing mechanisms for including energy poverty households in decision-making bodies (*e.g., such as quotas, committees, or representative positions*).
- Benefits: By including energy poverty households in governance, their unique perspectives can be considered, leading to more a more inclusive and just governance.

Promotion and Outreach Model focuses on actively promoting the active participation of energy poverty households in energy communities.

- How to do it: Strategies for targeted outreach, financial incentives, and specialized support services to encourage and facilitate the involvement of vulnerable households. (*e.g., connection with social services at the public level*)
- Benefits: This model helps overcome barriers to entry and ensures that energy poverty households are aware of and encouraged to engage with energy communities.

The Energy Poverty Tackling Plan is intended mostly for energy communities, specifically:

- Administrators or promoters responsible for managing and overseeing the operations of energy communities can use the plan to develop strategies and initiatives that address energy poverty effectively.
- Individuals who are interested in setting up an energy community from scratch, providing inclusion and equality since the beginning.
- Members who are part of an energy community that want to gain insights from the plan to actively participate in tackling energy poverty or advocating for a change in the inclusion of vulnerable households in governance, within their internal governance.

The Energy Poverty Tackling Plan for Energy communities can be found online in the COMANAGE Open Platform. Material available are the Plan in PDF format and 4 infographics on:

- What is Energy Poverty?
- Transformative governance to eradicate energy poverty.
- Frequently Asked Questions for inclusive participation; and
- 3 steps to overcome quotas as an entry barrier.

Infographics were done to facilitate the use of the materials.



Table 3. Access the Energy Poverty Tackling Plan for Energy Communities

5.3.3. Tailoring needs

Concerning the tailoring needs the Energy Poverty Tackling plan can be easily tailored to specific needs, context, community environment, target groups, and participation dynamics of each Pilot. As for the participation plan, it should be implemented according to the diverse population and cultural norms of the specific region, considering the following aspects:

- Adapt and translate it into the language to ensure comprehension and accessibility, and symbols used, avoid cultural stereotypes,
- Consider literacy levels and provide alternative formats or channels such as audio, tutorials, or any visual materials to facilitate understanding,
- Modify participation methodologies to align with local practices and models.

Even though some specific tailoring actions were initially foreseen, after implementing the tool, the only tailoring done for the COMANAGE pilots, was translation to local languages, Catalan, Italian, Polish, and Spanish.

5.4. Gender equality checklist

The [Gender equality checklist](#) is a tool that was developed after the first prototype was launched, and it was born from the existing needs to overcome some gender related barriers. Many times, the first step to overcome some barriers is to be aware of their existence, and that is the focus of this tool, making Energy Communities aware of their situation from a gender perspective, to be able to apply corrective actions or specific strategies.

5.4.1. Main objectives

The gender equality checklist aims to help Energy Communities to identify “red flags” to gender equality within their communities. This is a simple tool for energy Communities to ask themselves questions regarding:

- *Participation*
- *Support & inclusive measures*
- *Skills & knowledge*
- *Economic Resources*
- *Women empowerment*

5.4.2. Structure of the tool (Format, features, & target audience)

This tool is addressed to all Energy Community members, so that they at any point can ask themselves these questions, to identify where things could be done differently to protect and promote gender equality.

The tool is an infographic, available in the COMANAGE Open platform.



Table 4. Access the Gender Equality Checklist

5.4.3. Tailoring needs

As the other social participation tools, this tool can be easily tailored to specific needs, context, community environment, target groups, and participation dynamics of each Pilot. When implementing the tool, namely, asking the questions, it is important to consider the diverse population and cultural norms of the specific region.

When implementing the tool, the only tailoring done for the COMANAGE pilots, was translation to local languages, Catalan, Italian, Polish, and Spanish.

6. Communication & Dissemination tools

Communication plays a key role in spreading energy communities' initiatives so they can expand and encourage wider participation, ultimately contribution to ensure ECs long term sustainability and therefore a transition towards a more sustainable, democratic, and decentralised energy system. The communication tools aim at maximizing the reach of communication activities related to energy communities, by means of **ready-to-use materials** that can be integrated in the communication plan of local public authorities, existing EC initiatives or other entities promoting the creation and the sustainability of energy communities.

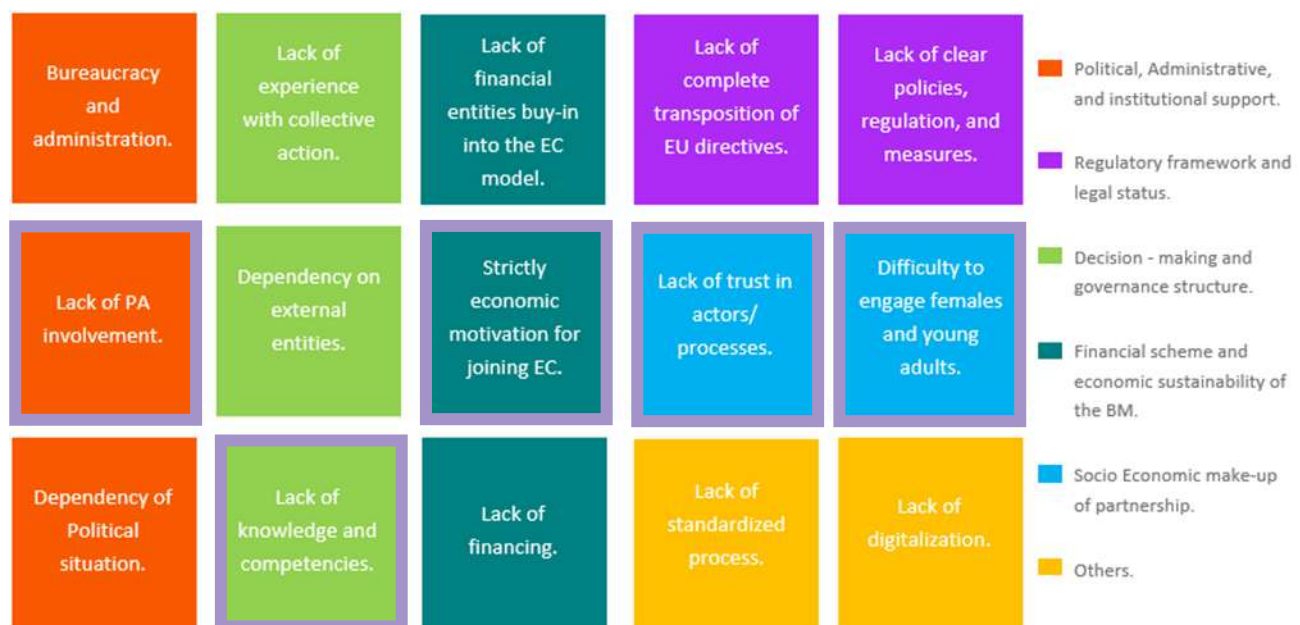


Figure 14. Selection of barriers for the Communication tools

Within the barriers identified in the deliverable *D2.2 Energy communities' barriers, needs and best practices analysis*, the communication tools:

1. Create communication material able to clearly explain the EC model and the benefits it entails, so that the community members can make aware considerations and decide to **join an EC not only for the economic motivations** but also for the social and environmental benefits implied by the model.
2. Facilitate the **involvement of Public Authorities**, associations and community leaders in communication activities, providing them with ready-to-use materials that help overcome **lack of knowledge and competencies** they might face when explaining how an EC works to potential new members.

3. Target the promotional material to the most **difficult groups to engage, such as female and young adults**, by means of an inclusive and assertive communication that speak to their interests and represents them, fostering their **trust in actors and processes** which are often perceived as exclusionary and are reclaimed by certain social groups.

6.1. EC communication video package

The EC communication video package consists of **two videos per pilot**: 1) an animated movie introducing the concept of energy community and their role in the local energy transition and 2) a Storytelling video on how COMANAGE is successfully supporting local EC initiatives and the resources to replicate them.

6.1.1. Main objective

The tool is designed to **create awareness** in the public around the concept of community energy, providing a basic knowledge of how an EC works and encouraging the viewers to take part and promote local initiatives. The main objective of the videos is to reach a vast public with little knowledge of energy communities, to clearly explain the EC model and its social, economic and environmental benefits.

The videos also aim at **increasing the trust of community members** in the constitution process of an EC, as well as in the actors traditionally involved in the energy sector. For this reason, the videos target specifically the groups that are more often left out from decision-making positions, including women, young adults, elderly, migrant communities, tenants, low-income households and so on.

The videos could potentially be used by multiple actors involved in different stages of promotion of ECs: from enthusiastic citizens raising the awareness of their network, to local public authorities promoting a democratic energy transition in their territory, from an association expanding its activities in the energy field to an established EC looking to increase its members.

6.1.2. Structure of the tool (Format, features & target audience)

The videos are short (between 2-3minutes long) and straightforward, to adapt to the attention span of different social media platforms and increase the number of shares. The storyboard is designed around quick and catchy messages that favour both “mouth-to-mouth” communication of instant messaging (WhatsApp, Telegram, etc.) and social media content share (Instagram, TikTok, etc.). The video frame is adapted to the proportions used in each platform and provided with a brief text for posts and messages (including links, hashtags, or keywords).

During the last years, a high volume of videos regarding energy communities has been created by private companies, local authorities, and public-funded European projects such as COMANAGE. We have learnt from these experiences, to complement their scope and avoid the replication of ineffective messages with low number of views.

The viewer should be able to distinguish the videos at first sight and be keen to share it with its network. To get this effect, the following actions were implemented: the use of unique and eye-catching animations³ and a memorable and catchy soundtrack⁴, also integrating a comforting, amusing or recognizable human face speaking to the public^{5 6 7}. It was important to avoid trivial content, such as sample images and songs, or overused styles that tend to be associated with project communication, such as the animation of hands drawing⁸ or a set of icons building up what is being explained⁹.

When creating a video capsule for communication purposes, it is crucial to prioritize, as mentioned in the Gender Mainstreaming chapter of deliverable *D2.2 Energy communities barriers, needs and best practices analysis*, inclusive language, and gender representation including all the social profiles without any discrimination of **origin, ethnicity, language, age, and functional diversity or body appearance especially in this set of tools**. This involves using gender-neutral language, balancing gender and inclusive representation when selecting voices and characters, avoiding stereotypes, and providing equal opportunities for participation. By incorporating these practices, you can ensure a fair and respectful portrayal of all individuals, foster inclusivity, and promote equitable communication.

The storytelling videos have been recorded in the pilot countries with a length of 5-6 minutes, taking advantage of onsite project meetings and also some Hub events, not only to be able to interview some key actors but also to record images of the pilot locations.

The videos included in the ECG Toolkit are an extract of more extended videos used for the project dissemination.

[Have a look at the video of Energy Communities management through the COMANAGE project.](#)

[Have a look at the mix Storytelling video](#)

[Have a look at the ANCI Lazio storytelling video](#)

[Have a look at the KMA storytelling video](#)

[Have a look at the AMB storytelling video](#)

³ Electra Energy Coop (ENG / 2023) – “The Transformative Potential of Energy Communities || GR Subs” - <https://www.youtube.com/watch?v=RYH5gjdQbkE>

⁴ Enel Green Power (ITA / 2022) – “Renewable Energy Communities: let’s share sustainable energy.” - <https://www.youtube.com/watch?v=eiEGu3eSM8E>

⁵ Hope (ESP / 2023) – “Comunidades energéticas. La revolución que viene ya está aquí.” – <https://www.youtube.com/watch?v=c-scQLBKt40>

⁶ Soluzioni Green (ITA / 2023) – “COMUNITÀ ENERGETICHE: Cosa sono? Come funzionano?” – <https://www.youtube.com/watch?v=Atugm9B5rPg>

⁷ EUCENA  European Citizen Energy Academy (ENG / 2021) – “EUCENA  CC 1.1 Untap the Potential of Citizen Energy / Compact Course” – https://www.youtube.com/watch?v=WTfI132Zuzw&list=PLtExF_IVZd8j_blwx5LCfn_oK-dmZuK02

⁸ València Clima i Energia (CAT / 2020) – “Què és una Comunitat Energètica?” – <https://www.youtube.com/watch?v=33t1MRBKOLE>

⁹ Enel Green Power (ITA / 2023) – Come funzionano le Comunità Energetiche Rinnovabili” – <https://www.youtube.com/watch?v=72EN3DKSYr8>

6.1.3. Tailoring needs

Both videos are available in the local language of the pilot. The animated movie was created in English and keeps the same content for all pilots. The tailoring was consisted in its translation and dubbing. The Storytelling videos are tailored to its respective pilot and presented in the local language to ensure that the message is accessible and resonates with the target audience. The production involved a range of local stakeholders and relevant public figures, including representatives from the chamber of commerce, experts on the field of urban planning involved in initiatives supporting REC, and municipal representatives working to improve energy efficiency and air quality.

6.2. Ready-to-use materials for third parties for recruitment and expansion

Communication plays a key role in spreading energy communities' initiatives so they can expand and encourage wider participation, ultimately contribution to ensure ECs long term sustainability and therefore a transition towards a more sustainable, democratic, and decentralised energy system. Different tools such as ready-to-use posters, communication materials and EC presentations were made available for collectives to adapt and use. The following images serve as an example extracted from a customizable template document.



Figure 15. Call to action poster template



Figure 16. Generic communication info sheet template

6.2.1. Main objective

The communication tools for energy communities address and overcome several barriers by **increasing awareness, understanding, and engagement**. They help simplifying complex information, breaking it down into visually easy formats with step-by-step guidance; facilitate access to resources such as legal frameworks, financial support, and technical expertise, always providing easy-to-read, interpret and understand content that does not imply high dedication.

The specific objectives of the ready-to-use materials are as follows:

1. They present information in a **clear and concise manner**, avoiding technical jargon and complex language to ensure accessibility for a broad audience, informing them about the benefits, opportunities, and importance of participating in energy communities.
2. They **attract individuals and motivate** them to join the activities of energy community projects. Visual appeal is incorporated through attractive designs and infographics, facilitating comprehension and capturing attention.
3. They **inspire and encourage** potential participants to self-organise and expand the EC services or scope. Real-life examples and case studies are used to illustrate the tangible benefits and potential impact of energy communities, inspiring individuals to get involved.
4. They provide **clear and concise instructions**, and resources that enable interested individuals to navigate the process effectively. Multilingual support is provided, enabling diverse audiences to access and understand the materials.

6.2.2. Structure of the tool (Format, features & target audience)

The ready-to-use materials for energy communities can potentially take various formats to cater to different communication channels and audience preferences. Some common formats include:

- Concise and visually appealing **printed materials** (like brochures and pamphlets) that provide an overview of energy communities, their benefits, and steps to get involved. Templates for infographics, stickers and posters have been created.
- Comprehensive **presentations** (in PPT) that offer generic EC knowledge, step-by-step instructions, and resources to support the establishment and operation of energy communities.
- Utilizing **social media platforms** to disseminate EC initiatives news, success stories, and engaging visuals to reach a wider audience and foster expansion and the creation of other EC.

As most tools included in the COMANAGE ECG Toolkit, they are addressed to civil servants or EC managers or promoters supported by civil servants. These communication tools can also play a key role in helping civil servants to disseminate the need to promote and participate in EC around the metropolitan areas.



[English](#)



[Catalan](#)



[Italian](#)



[Polish](#)



[Spanish](#)

Table 5. Links to the ready-to-use communication tools

6.2.3. Tailoring needs

Communication tools are professionally designed and tailored to convey key messages, positive aspects and improvements done within the projects, capturing the interest, and calling people to action to enhance energy communities. These ready-to-use materials provide consistent and coherent messages, that help engaging with the Pilots specific audiences, attracting new participants, and expanding their influence. The different communication tools have been tailored and adjusted to the specific audiences, channels, events, and languages of the COMANAGE OIS Hubs. The impact messages have been designed according to the main specificities and state of-the-art of the three pilots.

Specific communication materials, local leaflets have been created but are not part of the COMANAGE tools. However, in case these materials are considered valuable either for new or existing initiatives, they could be uploaded to the COMANAGE Open Platform as another free tool.

7. Financial tools

The financial tools aim at providing a comprehensive step-by-step methodology to define the **Energy Community Business Model (ECBM)** and create a set of **standard-compliant financial documents** that could be presented to financial institutions or public tenders to obtain financing. The tools are supported by all the explanatory notes and guidelines needed to assess the economic viability of the EC model and understand the value of the outcomes.

In particular, the tools proposed cover two steps of the economic viability assessment of ECs: 1) the definition of an ECBM, through the **EC Business Model Canvas** designed to consider specific needs, characteristics, and context of the energy communities; 2) the **ECBM Valuation** in objective terms, through the application of the standard VALERI methodology and the generation of economic valuation outcomes.

Within the barriers identified in the deliverable *D2.2 Energy communities' barriers, needs and best practices analysis*, the financial tools:

1. Provide EC members with standard-compliant financial documents that can support ECs in the **search for funding** and facilitate the **financial entities buy-in of the EC model**.
2. Include social and environmental criteria in the definition of the EC Business Model, so that the community members can take aware decisions and decide to **join an EC not only for the economic motivations** but also for the intangible long-term benefits given to the whole community.

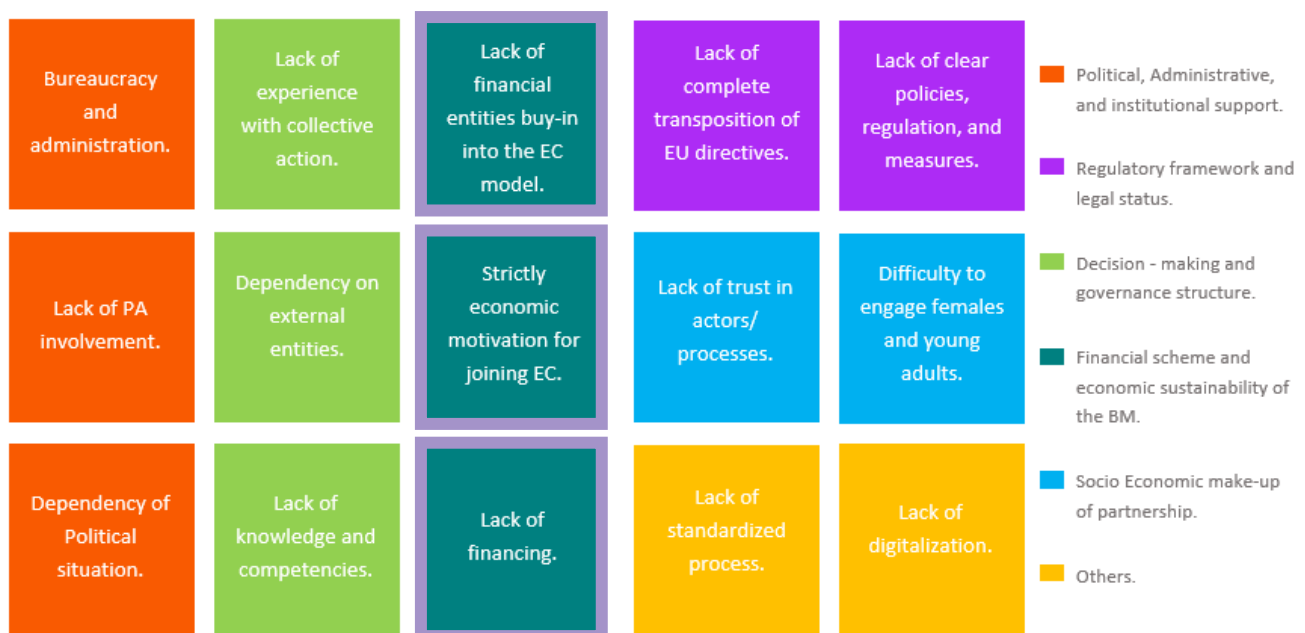


Figure 17. Selection of barriers for the financial tools

7.1. EC Business Development Enhancement tool

This section introduces the multi-purpose **EC Business Development Enhancement** financial tool which is targeted to new as well as existing ECs to help them define (or re-define) their business model in function of their capabilities, goals and aspirations, while at the same time providing a well-structured and well-documented set of standardized-format economic and financial data, simplifying the due-diligence process for financial entities and helping establish robust and reliable metrics. The tool drives the users through the financial steps required to ensure the sustainability of ECs and it is composed by **four subsequent steps**, as depicted in Figure 15:

1. The tool starts from a version of the **EC Business Model Canvas**, which is a framework that helps stakeholders analyse and fill relevant sections of the Business Model Canvas to the specific needs, characteristics, and context of their energy community. The Canvas includes the environmental and social as well as economic aspects relevant to the activity of an EC. In this step, through a process of guided analysis and introspection, the EC participants can structure and organize the information they have available and formalise their goals and aspirations.
2. Then, a second step consists in the **identification of key features from the ECBM**, which consists of a semi-automatic methodology to identify key features from the ECBM drawn on the previous steps and translate them into flows of services, goods, or currency. In this step, the user is guided in determining and assessing the main flows of value, thus feeding them into the third layer or step of the tool.
3. This third step consists of the **ECBM Valuation**, in which the ECBM is evaluated in objective terms, using the characteristics obtained in the previous steps as inputs. This step makes use of a customized implementation of the VALERI method, the main result of which is a complete analysis of the EC in economic and financial terms, which enables the production of highly standardized and comprehensive financial report on the fourth step of the process.

The last step consists of the elaboration of **Valuation Outcomes** obtained from the application of the VALERI methodology, which are conceived to be completed and customized by hand, and presented to financial institutions or grant applications. The outcome is presented in two reports: the first outlines the defined business model of the energy community, and the second includes a standard financial report, cash flow identification, and a sensitivity and multi-scenario analysis.

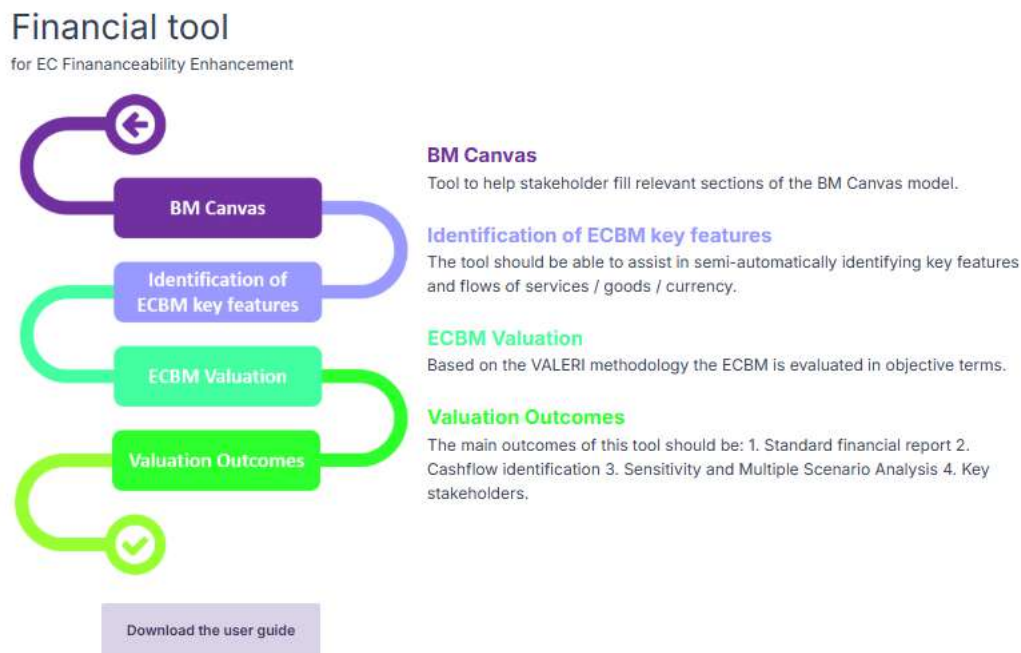


Figure 18. EC Business Development Enhancement Scheme

7.1.1. Main objective

The primary objective of the EC Business Development Enhancement tool is to provide a clear and comprehensive methodology to define a complete ECBM upon which all EC members can find a consensus and translate the results of this discussion into a set of standardized-format economic and financial data that could be presented to financial entities or public tenders. The tool also aims to break down complex economic and financial concepts into easy-to-follow guidelines, ensuring that all relevant stakeholders, including energy communities and civil servants, have a more solid understanding of the economic plan of the initiative in which they are involved.

Another objective covered by the tool lies in the explicit integration of social and environmental criteria in the definition of the ECBM, so that more community members can feel interested and involved in the discussions around the economic structure of the EC since the intangible long-term benefits given to the whole community are taken into consideration. The exercise of drawing the ECBM Canvas can be repeated periodically through an EC lifespan, to sustain the original values of the EC and review the flaws that might have originated.

This tool enables energy communities to systematically assess their financial structure, evaluate revenues, costs, and risks, and ensure the long-term economic sustainability of their business model.

7.1.2. Structure of the tool (Format, features & target audience)

Initially, the goal of the financial tool prototype was to produce an excel-based tool that serves as a guide to implement the previously detailed four phases. However, along the process it was seen that an excel-based tools was harder to use by many users, and it was decided to improve it, and make it an online digital tool, to which people can access and register. So, automated actions were implemented in this tool, to make it more user friendly, and also a user-guide was created to guide the process and highlight some key aspects when using the tool. The PA staff will have to acquire a basic level of understanding of the proposed processes, to act as facilitators regarding the EC.

1. EC Business Model Canvas

The Business Model Canvas is a systematic approach that allows the definition, creation, and comparison of existing business models. It is the most widely used BM analysis tool nowadays, and it sits at the base of the framework that has been chosen to help categorize the different business models. However, upon discussing internally and within the consortium, it has been noted that BM Canvas, as most other previous-generation business modelling tools, is dramatically over-simplified. It focuses on short-term profitability, rather than accepting the reality that the financial aspects of an enterprise are interdependent with a business larger context, the society in which it is inserted and the environment upon which it builds.¹⁰

The Flourishing Business Model Canvas has been suggested as an alternative tool that helps assess the overall long-term viability of the proposed ECBMs, and as such the decision was made to integrate it into the Financial Tool Prototype.

However, with the migration of the excel-based tool to a more “self-service” online tool, the Flourishing BM Canvas model has proved too complex to implement properly, which is why the decision was made to revert back to the simpler BM Canvas model.

2. Identification of key features from the ECBM

According to the BM methodology, the next step is to quantify and simulate the business model, and the way to achieve this starts with answering for each of the previous items the “How much / how many” questions. These questions would prompt individuals to provide specific quantitative information and measures related to different aspects of the business model. To facilitate the process, a semi-automatic methodology is employed to help users identifying key features from the ECBM drawn on the previous steps and translate them into flows of services, goods, or currency. During this step, the users are guided in determining and assessing the main flows of value, thus feeding them into the third layer or step of the tool. This step is visually presented to the user as a visual scheme with a list of examples or easy-to-read and to follow guidelines. By using this format, the individuals are able, on the one hand, to easily visualize and manipulate the quantitative aspects. Whilst from the other they are able to organise all the data about available resources, possible revenue and costs and any other relevant factor to optimise all the cashflow. The results of this process are classified and fed into the VALERI methodology.

¹⁰ “Flourishing Business Canvas Interactive Detailed Guide”

3. ECBM Valuation – VALERI methodology

The UNE17463 Valuation of Energy Related Investments (VALERI) standard provides a description on how to gather, calculate, evaluate and document information in order to create solid business cases in the energy sector. An adapted version of the VALERI method is adapted to Energy Communities BMs, using the key features identified in the previous step as inputs.

The scope of the VALERI standard is to help proposers of energy related investments (ERIs) to evaluate their ideas economically and qualitatively in a uniform, transparent and understandable way, to generate objective and comparable results. All this helps decision-makers and financial entities in the valuation of economic proposals.

The VALERI method is a single calculation method based on the Net Present Value, which is the difference between the present value of all cash inflows and outflows to tell an investor whether the investment is achieving a target yield at a given initial investment. The application of this method yields on a single indicator, the value of which can be directly used for decision-making in a transparent and easy-to-use way. The standard also specifies the realisation of sensitivity and multiple-scenario analyses.

The standard includes a four step Investment Valuation Procedure, developed in the picture below and a methodology for submitting structured documentation.

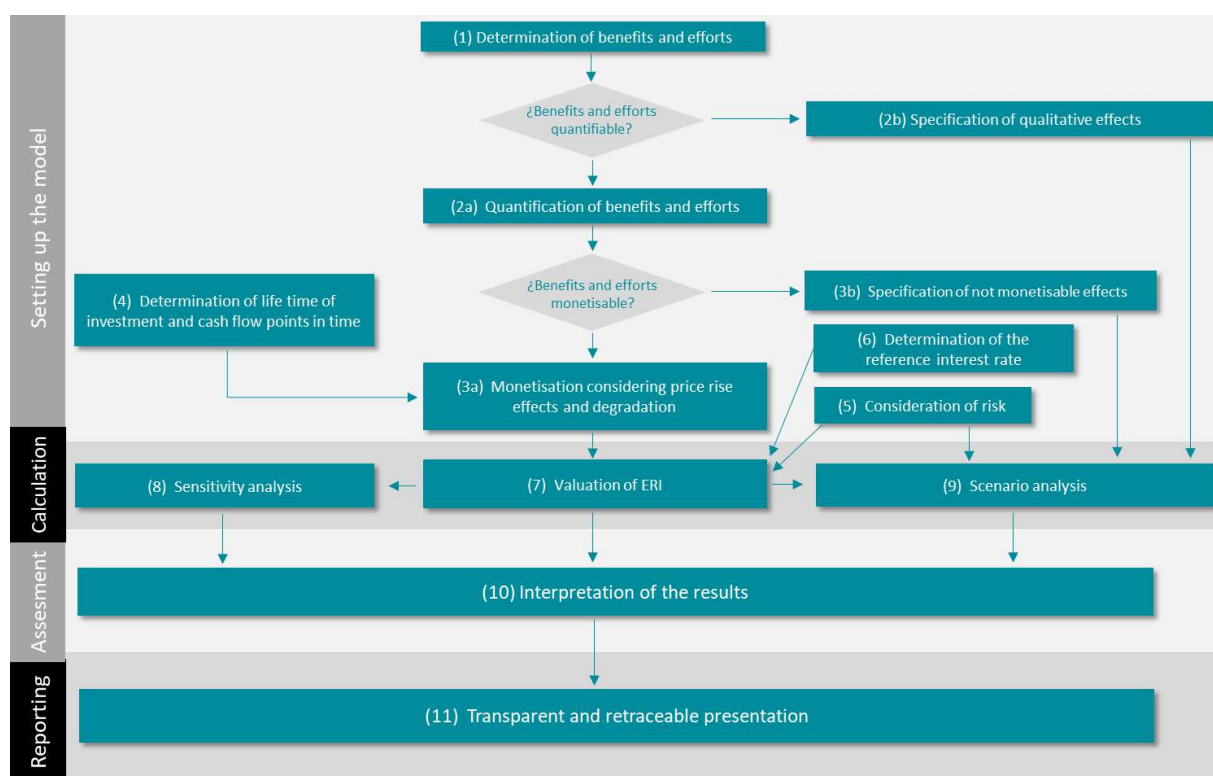


Figure 19. Valeri Method Scheme

4. Valuation Outcomes

The last step consists in the elaboration of Valuation Outcomes obtained from the application of the VALERI methodology, including two reports: the first outlines the defined business model of the energy community, and the second includes a standard financial report, cash flow identification, and a sensitivity and multi-scenario analysis.

The documents are automatically created in a format compliant with national regulations and common practice of financial institutions, to be directly presented to external stakeholders. Still, an editable version of the documents is available, either in Excel or in Word format, to enable later corrections from the users in a more agile manner. In this way, if corrections to the documents must be made to respond to the will of the EC assembly, it will not be required to pass through all the process again.

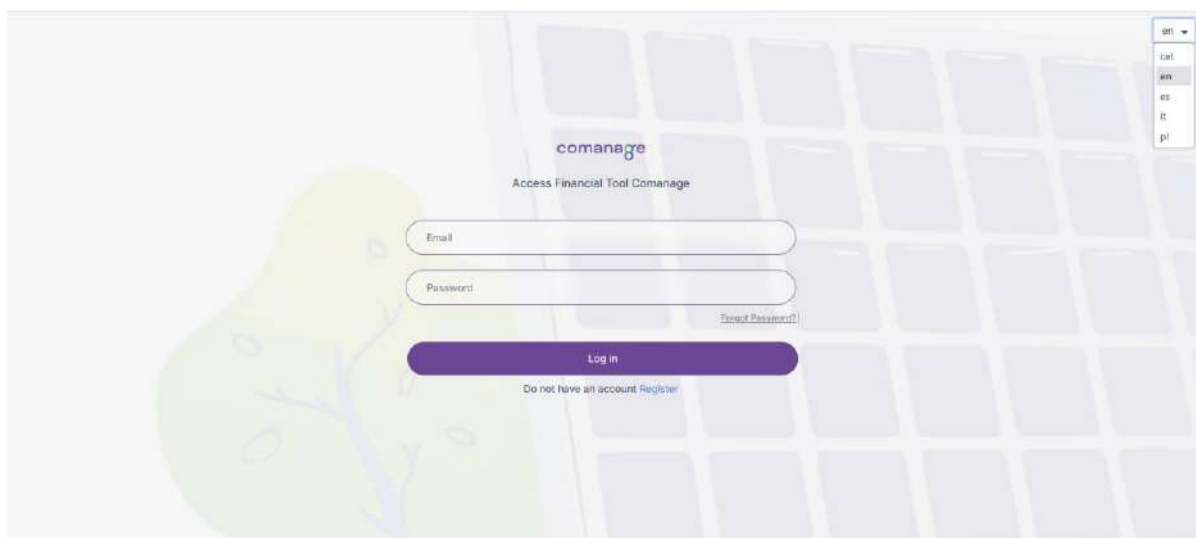


Figure 20. Access the COMANAGE Financial tool

7.1.3. Tailoring needs

The tailoring for financial tools only slightly impacts the ECBM Canvas designed, since the main components of EC a business models usually adopted in Europe do not differ widely. Additionally, the ECG Toolkit mostly focuses on associations and cooperatives since these have been identified as the widely preferred and most used legal body for ECs across Europe. On the other hand, the identification of key features for the simulation of the ECBM requires the utilization of context specific values to quantify the flows of services, goods, currency, etc.

In a similar way, while the application of the standard VALERI methodology does not need tailoring, the format of the economic valuation outcomes must be adapted to the legal requirements and the common practice of financial institutions in different national contexts. Specific financial numbers such as interest rates, subsidies, etc., which may vary from one country to another, were considered while tailoring the tools, besides the translation to pilot languages.

Finally, the whole procedure has benefited from the testing done in a specific OIS Hub session, to verify how useful and how rigid the tool is to adapt to real-life needs of EC in each pilot.

8. Legal and administrative tools

The legal and administrative tools aim at providing a comprehensive set of legal templates that can speed up the bureaucratic procedures that energy communities must undergo, liberate time and resources from their members and incentivize the participation of other citizens and relevant stakeholders. The tools are supported by all the explanatory notes and guidelines needed for a legally sound application of each document.

In particular, the tools proposed cover the documentation required in different life stages of ECs: 1) the set-up of the EC, through legal templates for **constitution and internal regulation** of associations and cooperatives; 2) the activation of energy sharing services, through contract template for **leasing of private rooftop** and 3) the expansion and mainstreaming of the EC model, through templates for **municipal tax incentives**.

Within the **barriers** identified in the deliverable *D2.2 Energy Communities barriers, needs and best practices analysis*, the legal and administrative tools aim to:

1. Propose a set of **standardized processes** and methodologies to overcome the **bureaucracy and administration** obstacles that members might encounter throughout the EC lifespan.
2. Provide members with useful precompiled documents and the instructions on how to use them, covering for the **lack of knowledge and competencies** and **experience in collective action** they might encounter.
3. Provide the opportunity to **Public Authorities to get involved**, promote and support ECs without having to dedicate many resources to it; in the same way the tools make it easier for external private entities to lease their rooftop to and EC, improving the overall **trust in actors and processes**.

Legal and administrative tools are organised in a different manner since these tools have been very much tailored to the specific characteristics of each of the pilot hubs, considering their specific needs and local regulations.

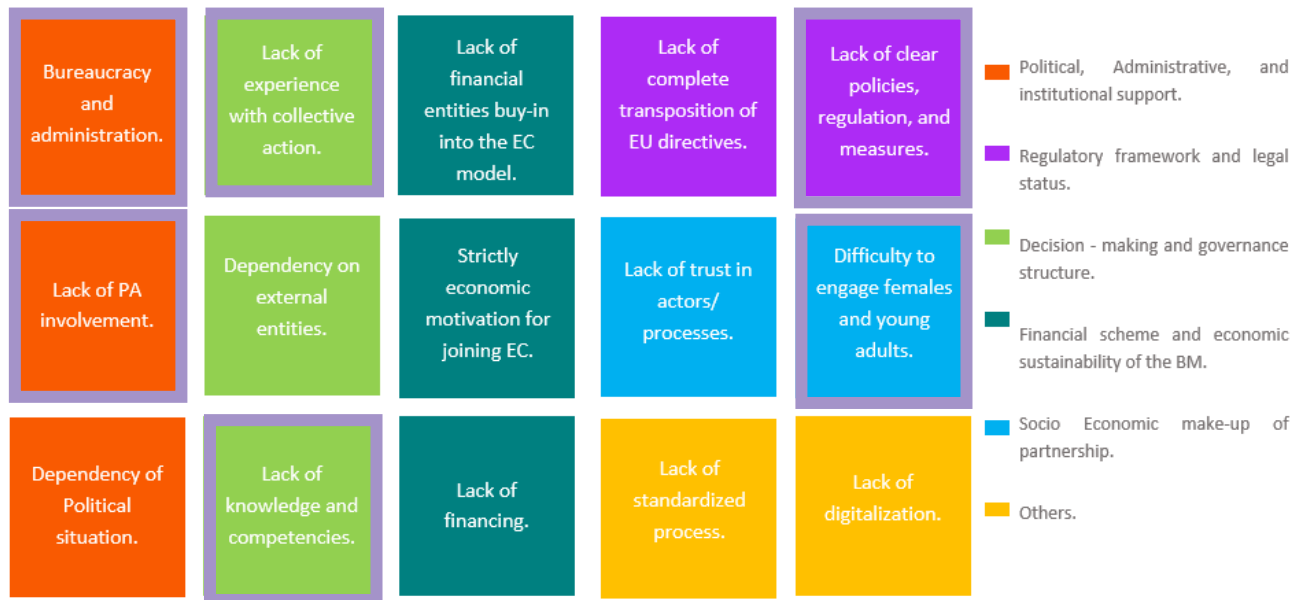


Figure 21. Selection of barriers for the legal and administrative tools

8.1 Legal and Administrative tools – Catalan context

This section provides a comprehensive overview of the legal tools developed in the Catalan pilot, to support the creation of inclusive and sustainable energy communities across Europe. These tools were designed to address the diverse challenges faced by municipalities, energy communities, and vulnerable populations in the transition to renewable energy. By offering standardized templates, strategic frameworks, and tailored guidance, these resources empower stakeholders to overcome barriers such as financial constraints, complex legal requirements, and limited community engagement. The tools outlined in this section aim to ensure that the benefits of renewable energy are accessible to all members of society, fostering greater social equity and sustainability within energy communities.

All materials were created both in Catalan and Spanish.

Based on extensive research, the following tools were developed:

1. *Statutes of a Consumers and Users Cooperative (model)*
2. *Statutes of an Association (model)*
3. *Regulation of Internal Regime of an Energy Community for association or cooperative (model)*
4. *Contract template for leasing of private rooftops between private parties*
5. *Template for municipal tax incentive on shared self-consumption initiatives*

6. *Agreement for the inclusion of vulnerable households in energy communities (model)*

[Access the legal and administrative tools for the Catalan context.](#)

[Access the legal and administrative tools translated to Spanish.](#)

8.1.1. Tools 1 & 2 & 3: Legal templates for constitution and internal regulation of associations and cooperatives

These tools were specifically chosen because they address the critical need for accessible legal resources that can significantly reduce the administrative burden on energy communities. Establishing associations and cooperatives requires a deep understanding of legal frameworks, which can be a barrier, especially for smaller organizations with limited financial and legal expertise. By providing ready-to-use legal templates, these tools offer a practical solution that not only saves time and resources but also ensures compliance with relevant regulations. This inclusivity is particularly important for fostering the growth of energy communities across Europe, regardless of their size or financial capacity.

Description of the tool and its use

The legal templates tool is an online resource accessible through the COMANAGE Open Platform, which allows energy communities to easily navigate and generate customized legal documents. The tool offers downloadable templates tailored to the constitution and internal regulation of associations and cooperatives. Users can personalize these templates by inputting specific information and adjusting the content to align with their unique legal requirements and operational needs. The tool also includes explanatory guidance, providing users with clear instructions and practical examples to help them understand the purpose of each document and how to adapt it effectively. Civil servants involved in supporting energy communities can also use this tool to ensure a smooth and compliant process for establishing and managing these legal entities.

Tailoring the tool to specific needs

To maximize the tool's effectiveness, it must be tailored to the specific legal and regulatory contexts of the regions where it will be used. The content of the templates should reflect the diverse legal frameworks governing associations and cooperatives across different European countries and regions. For instance, in regions like AMB, where the energy community sector is growing, the tool offers more complex templates that address long-term governance and sustainability issues, such as internal financing mechanisms. Additionally, the tool should consolidate existing templates from various sources into a centralized platform, ensuring easy access and customization for each energy community. By tailoring the templates to the unique needs of each region and legal structure, the tool will streamline the establishment and governance processes, fostering the growth and sustainability of energy communities.

8.1.2. Tool 4: Contract template for leasing of private rooftop

This tool helps solve the critical challenge of accessing suitable rooftops for solar PV installations in metropolitan areas. Public rooftops are often reserved for public-led projects, and private rooftops a valuable yet underutilized resource. The complexity of negotiating lease agreements and ensuring that all parties understand their rights and responsibilities can be a significant

barrier to the expansion of community solar energy projects. By providing contract templates that are easy to customize and legally sound, this tool helps overcome these challenges, making it easier for energy communities to secure the necessary space for their renewable energy projects.

Description of the tool and its use

The contract template for leasing private rooftops is a resource designed to be user-friendly and easily customizable. It provides a structured framework for lease agreements, clearly defining the rights, responsibilities, and obligations of both the rooftop owner (lessor) and the energy community (lessee). Key components of the template include terms related to lease duration, rental payments, maintenance, insurance, access rights, and dispute resolution. Additionally, the tool offers guidance on incorporating rooftop owners into the energy community when possible, linking with legal templates for internal governance. The tool also suggests attractive financial arrangements, such as profit-sharing models or long-term leases with variable rental rates, to incentivize rooftop owners to participate in renewable energy initiatives. By streamlining the leasing process, this tool reduces negotiation time and helps establish mutually beneficial agreements that support the growth of solar energy projects.

Tailoring the tool to specific needs

To ensure the tool's effectiveness, it must be tailored to the specific legal and economic contexts of different regions. The content of the contract templates should align with national regulations on private law, which govern lease agreements. In regions like AMB, where available rooftops are scarce due to municipalities reserving them for their renewable energy projects, the tool addresses these challenges by offering flexible templates that cater to a variety of potential lessors, such as industrial complexes, sports centres, and churches. Additionally, the tool should include recommendations for economic agreements that reflect the local economic conditions, ensuring that the financial incentives offered are attractive and viable. By customizing the templates to meet regional needs and addressing the specific hurdles faced by energy communities, the tool will effectively facilitate the leasing of private rooftops for solar PV installations, thereby supporting the broader adoption of renewable energy in metropolitan areas.

8.1.3. Tool 5: Template for municipal tax incentives

The municipal tax incentives tool was specifically chosen due to its potential to address significant barriers to the adoption of shared self-consumption photovoltaic (PV) installations in urban areas. High-density metropolitan regions often face challenges such as limited space, complex legal requirements, and financial constraints that can impede the development of renewable energy projects. This tool was selected because it offers a comprehensive approach to overcoming these obstacles by providing targeted tax incentives that make shared self-consumption more financially viable and legally straightforward. By incentivizing collective investment in renewable energy, this tool can drive widespread participation in energy communities, ultimately contributing to a more sustainable urban environment.

Description of the tool and its use

The municipal tax incentives tool is a comprehensive guide designed to assist municipal authorities and energy communities in promoting shared self-consumption of PV installations. The tool provides a structured framework that includes documentation of successful tax incentive models, step-by-step guidance on designing and implementing tax incentives, and assistance in navigating the legal complexities associated with these incentives. By offering economic analysis and financial

support mechanisms, the tool helps municipalities assess the viability of proposed incentives and make informed decisions. Municipalities can use this tool to design and implement tax breaks or reduced tariffs, making PV installations more attractive to property owners and energy communities, thereby increasing the adoption of renewable energy within their jurisdictions.

Tailoring the tool to specific needs

The effectiveness of the municipal tax incentives tool depends on its ability to be tailored to the specific fiscal policies and legal frameworks of different regions. Tailoring involves adjusting the tool's guidelines and recommendations to align with the unique regulatory environment, economic conditions, and local government capabilities of each municipality. For example, in the AMB Pilot, the tool addresses the needs of municipalities where current incentives are unclear or limited to individual self-consumption. By incorporating specific incentives designed for shared self-consumption and offering detailed guidance on navigating legal complexities, the tool can be customized to maximize its impact, encouraging broader adoption of PV installations and supporting community-driven energy initiatives.

8.1.4. Tool 6: Agreement for the inclusion of vulnerable households

The legal template for incorporating vulnerable households into Energy Communities was chosen because it addresses a critical issue: the financial barriers that prevent low-income households from participating in renewable energy initiatives. Entry fees and other financial requirements can be significant obstacles for vulnerable households, effectively excluding them from the benefits of energy communities, such as reduced energy costs and greater energy independence. This tool was selected for its ability to provide a clear and structured framework that removes these barriers, ensuring that energy communities are inclusive and accessible to all, regardless of financial means.

Description of the tool and its use

This template is a detailed resource designed to facilitate the inclusion of low-income households in renewable energy projects. The template outlines a legal framework that allows energy communities to waive entry fees and other financial obligations for vulnerable households, thereby eliminating a major barrier to participation. It provides standardized legal language and clauses that can be easily adapted by energy communities to their specific circumstances and local regulations. This tool helps energy communities create equitable and inclusive environments where all members, regardless of financial status, can participate and benefit from shared renewable energy resources. Municipalities and energy community leaders can use this template to ensure that their initiatives support social equity while promoting sustainable energy practices.

Tailoring the tool to specific needs

To maximize the effectiveness of the tool, it is crucial to tailor it to the specific legal and regulatory context of the region in which it is implemented. This may involve adapting the template to comply with local laws governing energy communities and financial regulations, as well as aligning it with the specific needs of the vulnerable populations it is intended to serve. For instance, in regions with higher poverty rates or significant energy inequality, the template might include additional provisions for long-term support or partnerships with social services. By customizing the tool to reflect local conditions and legal requirements, energy communities can ensure that the template is not only legally compliant but also highly effective in promoting inclusion and equity within their renewable energy projects.

8.2. Legal and Administrative tools – Italian context

Across Europe, the legal framework governing Renewable Energy Communities (RECs) still represents a huge hurdle, and Italian context is no exception. Delay in national implementation of EU directives, legal complexity, and administrative fragmentation all hinder the establishment and effective operation of RECs.

To overcome these challenges, ANCI Lazio, in collaboration with AISFOR, has designed a bespoke suite of legal and administrative tools within the COMANAGE project. These tools aim to streamline the creation and management of RECs by Italian municipalities and communities, ensuring legal conformity and operational clarity while providing practical guidance. These tools serve as essential resources for communities aiming to develop and manage their energy projects effectively, ensuring legal compliance and smooth operations, and include:

1. **Synthetic Schemes on different legal forms:** a comprehensive set of slides and templates providing clear guidance on the various legal forms that RECs can adopt. This helps communities choose the most suitable structure based on governance needs, membership size, financial structure, and regulatory requirements. The Model Statutes are included in this package, offering ready-to-use templates that align with both EU Directive 2018/2001 (RED II) and Italian legislation (e.g., Legislative Decree 199/2021). These templates cover foundational aspects such as decision-making procedures, governance, inclusion, and energy-sharing principles and are ready for adaptation by local groups.
2. **FAQs on Legal Issues:** a practical guide addressing frequently asked questions on legal matters related to RECs, providing solutions to common challenges and clarifying legal obligations. Some questions are connected to the synthetic schemes and statutes, making this tool fully complementary.
3. **Governance Toolkit:** once the set-up tools are finalized, this kit supports the operational and governance phase of RECs. Legal, technical-administrative, operational, and dispute management documents help turn the REC from a “concept” into a fully functional entity.

The COMANAGE Open Platform (COP) embodies an open-by-design approach, ensuring that the toolkit functions as a dynamic repository where legal instruments, case studies, and regulatory frameworks can be continuously updated and enriched over time. This allows communities to access the latest tools and guidance, maintaining practical utility across different contexts. A prime example of this approach in action is the Regulation of Rome Capital (Regolamento di Roma Capitale), which facilitates the use of public rooftops and municipal solar infrastructure by RECs. Rome’s City Council approved a regulation enabling either the allocation of municipal rooftops to third-sector entities for solar installations or the use of administration-owned solar systems to feed RECs. This pioneering initiative positions Rome as the first Italian municipality to systematically offer its building assets to energy communities, providing a regulatory model that can now be incorporated into the COP as a best practice.

By combining clear legal guidance, adaptable templates, practical FAQs, and an open, evolving platform, the COMANAGE toolkit provides Italian municipalities and communities with the instruments needed to navigate the complex legal landscape, promote the replication of best practices, and foster the effective establishment of Renewable Energy Communities.

[Access the legal and administrative tools for the Italian context.](#)

8.2.1. Tool 1: Synthetic Schemes on Different Legal Forms

This tool provides a comprehensible guidance through the legal framework of RECs, including **both the synthetic schemes and the model statutes**. It is designed to be accessible for non-technical users interested in setting up or joining a REC, offering a clear overview of legal forms, governance options, and practical steps. While it provides foundational legal guidance, REC managers may require additional economic and managerial resources. The tool is made up of 6 slides blocks: 5 of them are dedicated to each of the 5 different legal constitutive types, whereas the remaining one works as the “navigator”. The “navigator” includes a brief “legal vocabulary” section, a table where all the legal forms are compared and an in-depth description of the two main documents for all RECs legal forms (the same documents provided by the second legal tool “statutes”). In this way, users can understand both the general framework and the specific templates ready for use.

8.2.2. Tool 2: FAQs on Legal Issues

The choice of the set-up of such tool comes from the meeting with energy communities in Ventotene, where several questions were raised. This tool selected and answered briefly, yet clearly, to the more frequent ones, being able to provide a complementary tool to the legal forms’ schemes (Tool 1).

Brief description of the tool and its use

The tool consists of 10 frequently asked questions, available at the moment through a word document, that can be easily downloaded from the COMANAGE Open Platform. Some questions are connected to the legal schemes (Tool 1) and some are totally different, making it a complementary tool.

8.2.3. Tool 3: Governance toolkit

Once the tools supporting the energy communities in their set-up phase are finalized, one more step is to consider the governance phase. These tools will turn the Energy Community from an “empty box” into a subject capable of operating.

Brief description of the tools and their use

This is a kit of governance tools. In the dedicated section on the COMANAGE Open Platform, legal and technical issues are addressed and divided into 4 subsections:

1. **Technical-governance documents**: templates of documents having a purely legal nature that are pivotal to guarantee the rights and duties of the interested parties: indemnities, information including privacy, service’s contracts for the management of the REC, delegations and membership forms.
2. **Technical-administrative documents**: practical guides including those relating to the construction of energy production plants, EPC contracts, PPA, surface rights etc.
3. **Operative documents**: Excel files for the management of energy flows and the sizing of the CER.

4. **Disputes' documents**: Management of any disputes between members and between the CER and the members and between the CER and external parties (producers, energy suppliers etc.).

8.3. Legal and Administrative tools – Polish context

The section provides a comprehensive overview of the legal tools developed as part of the pilot project to support the creation of inclusive and sustainable energy communities across Europe. These tools are designed to address the various challenges that energy communities confront in the transition to renewable energy. Offering standardized templates and tailored guidelines, these resources enable stakeholders to overcome barriers such as complex regulatory requirements.

The tools in this section aim to ensure that the benefits of renewable energy are available to all members of society, supporting more social equity and environmental sustainability in energy communities.

The following tools were developed:

1. *Statutes of an energy community model with explanation*
2. *Model energy sales contracts with explanation*
3. *Model energy lease agreement with explanation*

The tools were prepared by a legal expert from the Frank Bold Foundation, who was subcontracted within the allocated budget. This expert has extensive experience in the field of energy communities, ensuring that the tools are both professional and compliant with current legal frameworks.

[Access the legal and administrative tools for the Polish context.](#)

8.3.1. Tool 1: Statues of an energy community model with explanation

The statute of an energy community serves as the primary and fundamental document outlining the operational framework of the initiative. This document is also mandatory for the formal registration of an energy community. The development and provision of this document within the framework of the COMANAGE project will greatly facilitate the establishment of new energy communities across Poland.

Brief description of the tool and its use

The statute of the energy community has been prepared as a Microsoft Word document, ensuring the possibility of editing. This document also includes a commentary, where each point of the statute is discussed in footnotes, considering various possible formulations of the statute depending on the circumstances. This allows each new community to adapt it to their specific conditions.

8.3.2. Tool 2: Model energy sales contracts with explanation

Emerging and newly established energy communities face the challenge of preparing appropriate contracts between producer members and the cooperative, as well as between the cooperative and consumer members, regarding the purchase/sale and transmission of energy. Therefore, in response to these needs, model energy sales contracts with explanations have been prepared.

Brief description of the tool and its use

Similar to the first tool, this tool has been prepared as a Microsoft Word document, where explanations of specific aspects of the contract provisions have been provided in the form of footnotes. Thanks to this approach, the tool allows for application in various configurations of energy communities, making it adaptable to different needs and circumstances. This flexibility ensures that each community can customize the contracts to fit their unique operational frameworks and requirements.

8.3.3. Tool 3: Model energy lease agreement with explanation

Another problem faced by energy communities is the lack of space for building renewable energy installations, particularly photovoltaic systems. One solution is to lease land or rooftops from community members. To facilitate this process, a model energy lease agreement with explanations has been prepared. This document ensures clarity and legal compliance, making it easier for communities to establish agreements that support their energy projects efficiently.

Brief description of the tool and its use

The tool was prepared in the same manner as the previous one. The Microsoft Word document includes footnotes that allow the agreement to be tailored to the specific conditions of a given energy community. This customization ensures that each community can adjust the terms and conditions to fit their unique operational environment and legal requirements.

9. Technical tools

The technical tool aims at providing resources to support the implementation of all the technicalities related to energy projects. The tools will help energy communities in the technical paperwork they must prepare to benefit from PV installations, liberating time and resources from their members. The tool is supported by all the explanatory notes and guidelines needed to drive through the tedious procedures of PV legalization for shared self-consumption.

In particular, the tool was initially composed of 1) a **protocol/user journey** that outlines a structured approach for ECs members to follow when engaging in shared self-consumption, and 2) **shared self-consumption templates** for the main documentation required by responsible parties for the setting up and operating of shared self-consumption systems. By the end of the project, other materials such as an energy billing model or a guide on how to become a prosumer were included.

Within the barriers identified in the deliverable *D2.2 Energy communities' barriers, needs and best practices analysis*, the financial tools:

1. Provide members with useful precompiled documents and methodologies for their preparation, to clear the way for the **standardization of the processing** of PV legalization for shared-self consumption and overcome the **bureaucracy and administration** obstacles that members might encounter in the process.
2. Reduce the burden on the members in charge of the PV installation process, covering for the **lack of knowledge and competencies** they might encounter.

As for the legal and administrative tools, technical tools have been organised according to pilot hub, since these tools have been highly tailored to the local context.

The different tools have been created by pilot partners with the support of knowledge provider partners within the consortium.

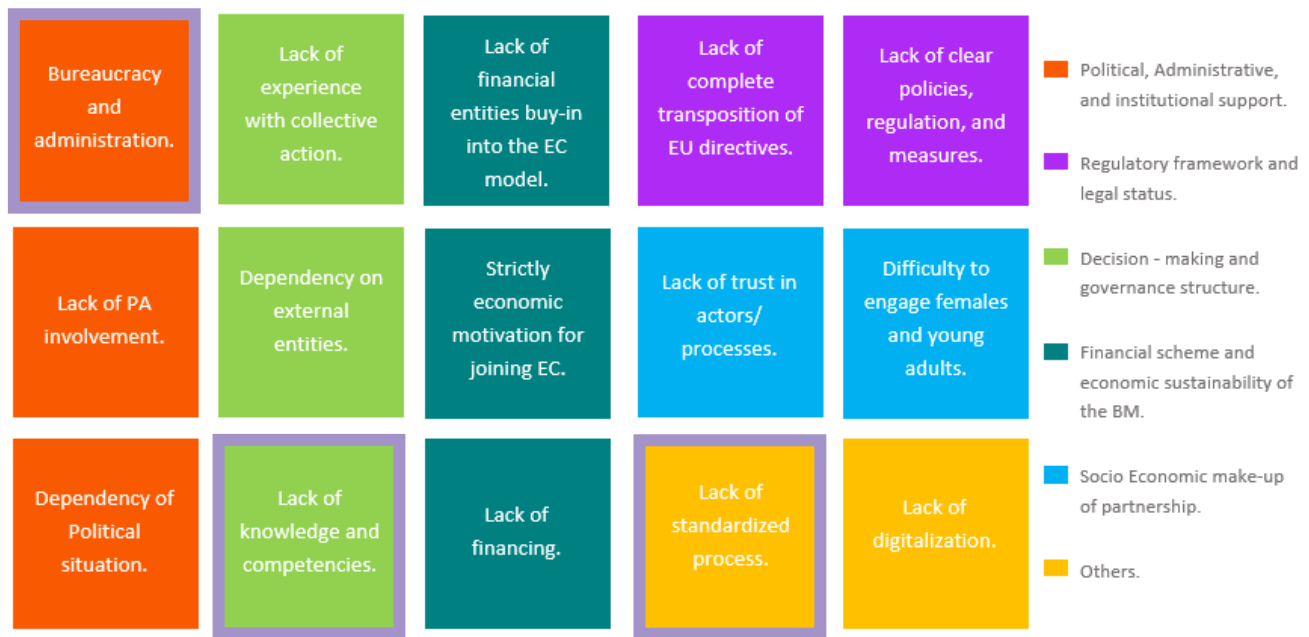


Figure 22. Selection of barriers for the technical tools

9.1. Technical tools – Catalan context

After a thorough research process, the **shared self-consumption protocol** was identified as an essential technical tool to be developed, with the aim to simplify and accelerate the legalization process for energy communities across Catalunya and Europe. As energy communities increasingly look to implement shared self-consumption initiatives, the complexity of legal, administrative, and technical requirements can become significant barriers. This tool addresses these challenges by providing a clear and structured framework that guides different stakeholders through the intricate processes involved, promoting transparency, compliance, and efficiency.

All materials were created both in Catalan and Spanish.

[Access the technical tools for the Catalan context.](#)

[Access the technical tools in Spanish.](#)

9.1.1. Tool 1: Shared self-consumption protocol

This specific tool was chosen because it directly addresses the critical need for **standardized and accessible resources** in the activation of shared self-consumption. In many European countries, while the legal framework exists to support such initiatives, the practical implementation has been hindered by lengthy procedures, lack of transparency, and resistance from established market players. By offering a comprehensive **protocol and ready-to-use templates**, this tool empowers energy communities and municipal authorities to navigate these challenges effectively, thereby enabling faster and smoother adoption of shared self-consumption models.

Description of the tool and its use

The shared self-consumption protocol and its associated template documents tool is a user-friendly resource, designed for municipal authorities and energy communities. It includes a detailed **roadmap** outlining each step of the legalization process, ensuring that stakeholders understand the legal requirements and necessary procedures. The tool also provides a collection of **customizable template** documents, including application forms, contracts, and technical specifications, tailored to the specific needs of shared self-consumption projects. Accompanying these templates are **explanatory notes** and **practical examples** that help users accurately complete the required paperwork. Additionally, as the tool is based on case studies from successful energy communities, it offers insights and potential risks that might need mitigation.

Tailoring the tool to specific needs

To maximize its effectiveness, the tool must be tailored to the national and regional contexts in which it will be used. Since photovoltaic (PV) legalization procedures vary significantly across European countries, the tool needs to be adapted to align with the specific regulations and technical standards. This customization process should consider the input from stakeholders with firsthand experience in PV legalization. By addressing the unique challenges and bottlenecks faced in different regions, the tool can provide more relevant and practical guidance, ensuring that it meets the diverse needs of energy communities across Europe.

9.2. Technical tools – Italian context

The 'Technical tools' uploaded by ANCI Lazio onto the COMANAGE digital platform are designed to support Italian Renewable Energy Communities (RECs) and local administrations in the effective management of the RECs and other sustainability initiatives. These tools include templates for establishing legal entities, public-private partnerships, internal regulations, and guidelines for implementing innovative solutions such as rooftop leasing for solar installations and municipal tax incentives. These resources address the specific regulatory and operational needs of the Italian context, aligned with the 2024 CER Decree.

The tools elaborated in Italian, are:

1. [Technical-economic tool for Renewable Energy Communities](#)
2. [Practical Guide to Building Your Energy Community](#)

9.2.1. Tool 1: Technical-economic tool for Renewable Energy Communities

Technical-economic tool for RECs, developed in an Excel file, is devoted to accompanying the REC with the minimum information necessary for the creation of the **business plan**, related to the approval of incentives (uploaded to the COMANAGE Open Platform). It includes a **checklist of criteria** to fulfil to establish the energy community. This tool aims to streamline the process, ensuring that all essential aspects are covered, thereby facilitating the successful implementation and operation of the energy community.

Brief description of the tool and its use

This simple yet effective spreadsheet is specifically designed for small-scale RECs with systems under 200 kW. It enables the simulation of different shared energy optimization scenarios and the possible distributions of incentives deriving from the production of renewable energy. It helps RECs make informed decisions, draft detailed community regulations and specify incentive percentages to be attributed to various actors and projects. For a more detailed analysis, we recommend using advanced software such as that of the Gestore dei Servizi Energetici (GSE) which analyses the real consumption data of members.

This tool is an excel file in Italian, composed of three main pages:

1. Introduction (with operating instructions)
2. REC Characteristics (for data entry of RECs)
3. Distribution Scenarios € (a calculation tool that considers only the incentive for shared energy directed exclusively to the REC)

9.2.2. Tool 2: Practical Guide to Building Your Energy Community

The "*Practical Guide to Building Your Energy Community*" aims to help users identify the essential steps for building and developing a Renewable Energy Community and quickly and easily discover all the material needed to create their own energy community. This guide aims to accompany the user through each phase of the process, providing the tools and resources to successfully start and manage your sustainable energy initiative.

Brief description of the tool and its use

The "*Practical Guide to Building Your Energy Community*" is an interactive 14-page document (PDF) designed to support individuals and organizations in creating their own Renewable Energy Community. It outlines the essential steps in building and developing such communities, offering clear, actionable insights. The guide simplifies the process by providing easy access to all the necessary tools, resources, and information to start and manage a sustainable energy initiative successfully. Through each phase, users are guided with practical advice, helping to ensure a smooth and effective implementation.

9.3. Technical tools – Polish context

Following the research process, KMA identified a few necessary technical tools to be developed to simplify and accelerate the legalization process for energy communities in Poland and Europe. As energy communities try to implement shared energy consumption initiatives, the complexity of legal, administrative and technical requirements can become a significant barrier. Tools responds to these challenges by providing a clear and structured framework that guides various stakeholders through complex processes, promoting transparency, compliance and efficiency.

- *Energy billing model for an energy community.*
- *How to become prosumer and next step to EC*
- *Energy analysis methodology*
- *Model of EC – step by step*

[Access the technical tools for the Polish context.](#)

9.3.1. Tool 1: Energy billing model for an energy community.

In response to the issue of the lack of an available free tool for **settling energy and payment transactions** between members of an energy cooperative, a model has been prepared for energy and payment settlements between producer members, consumer members, and the energy cooperative itself. This tool ensures clear and accurate financial transactions, facilitating efficient energy management within the cooperative.

Brief description of the tool and its use

The tool was prepared in Microsoft excel. The tool contains a dozen Sheets and was originally prepared for 10 cooperatives, but the number can be increased as desired.

The “metric” tab contains basic information about the cooperative and information about the location of the photovoltaic installation. The next two sheets “monthly” and “hourly” show the results of aggregating the calculations made for daily/hourly and monthly data. Importantly, the worksheets do not require any intervention, and the calculation is done automatically based on the entered data received from the Distribution System Operator. The following sheets contain data received from the Distribution System Operator:

- *Date,*
- *energy consumed by the cooperative,*
- *energy returned to the network by the cooperative.*

These data should be entered into the tool, and then the tool will automatically recalculate the remaining sheets. The resulting effect of the tool is a sheet containing the calculation of electricity for a given Cooperative by month.

The tool was prepared by a technical expert, who was subcontracted within the allocated budget. This expert has extensive experience in the field of energy and energy communities, ensuring that the tool is both professional and compliant with current legal frameworks.

9.3.2. Tool 2: How to become prosumer and next step to EC

The tool was created to make it easier for citizens to go **step-by-step** to becoming a prosumer and then to join or create their own energy cooperative.

Brief description of the tool and its use

It is a descriptive tool that guides the resident through the steps up to **becoming a prosumer** and joining or creating an energy cooperative. The tool consists of 8 steps in accordance with Polish legal regulations. In each of the following steps we have possible situations which influence the next step. An excerpt of the tool along with the first steps is in the infographic below. The entire tool is available on the COMANAGE Open Platform and is in Polish. The tool includes comments to make it easier to use and show the way with the most common questions.



Figure 23. How to become a prosumer, first steps

By following the steps of the tool, the resident reaches the point where he becomes a prosumer. The last step in our tool is information about the possibility of joining a local energy cooperative or, if there is none, to set up their own energy cooperative.

The tool was prepared in Microsoft's Power Point program; next it was saved in PNG graphic format enabling it to be opened on any computer with windows system.

9.3.3. Tool 3: Energy analysis methodology.

Regarding the establishment of an energy community by local governments, it is important to raise awareness of energy management within their territory. For this purpose, a methodology for municipal energy analysis has been developed to support actions aimed at increasing energy efficiency in the area.

Brief description of the tool and its use

This is a PowerPoint presentation describing the actions that a municipality may undertake to optimize energy consumption. The methodology includes the following elements:

- **Verification and selection of the appropriate tariff group** for a given entity, ensuring the most favourable energy procurement conditions depending on the building's consumption profile.
- **Adjustment of contracted and connection power** – an optimization measure aimed at increasing or decreasing the contracted or connection power, ensuring that the municipality does not incur unnecessary costs.

- **Reactive power compensation** – allows verification of whether the equipment used by the municipality is properly adjusted and does not generate additional costs.
- **Acquisition of white certificates** – covers issues related to obtaining white certificates and their potential sale, generating additional revenue for the municipality.
- **Changing the energy supplier** – provides information on the municipality's rights as an energy consumer and the procedures for switching to a more favourable supplier.

The tool was prepared by a technical expert, who created also Energy billing model for EC.

9.3.4. Tool 4: Model of EC – step by step.

In addition, a document has been prepared describing energy communities (cooperatives and clusters) from a technical perspective, including a detailed step-by-step guide outlining the necessary actions to establish such communities.

Brief description of the tool and its use

This document is presented in the form of guidelines. It describes the functional and technical model of energy communities, in particular energy cooperatives and clusters. It discusses the generation sources available to these forms, the role of energy storage, and the relationships between community participants, including the flows of both energy and information. The document also outlines the "step-by-step" process of establishing an energy cooperative or an energy cluster and presents practical examples of such communities, along with an analysis of their benefits.

The tool was prepared by a technical expert, who created also Energy billing model for EC.

10. Conclusions

In conclusion, the implementation of the COMANAGE ECG Toolkit tools marks a significant milestone in empowering stakeholders involved in energy communities. These tools have been carefully developed based on the main barriers identified during the preliminary phase of the project. The choice of the tools has followed a process of benchmarking of other projects working on EC support tools, and the discussions in specific Working Groups per topic within the consortium partners. By addressing legal and administrative challenges, promoting social participation, disseminating information effectively, securing financing and addressing technical aspects, these tools provide a comprehensive framework for successful project implementation and long-term sustainability.

The COMANAGE ECG Toolkit tools are easily accessible through the COMANAGE Open Platform, which serves as an integrated hub for all project digital outputs. This platform ensures that stakeholders have seamless access to the tools and resources they need to navigate the complex landscape of energy communities. Furthermore, the tools have been developed, tailored, and fine-tuned by the OIS Hubs to the specific needs of the three pilot areas, ensuring their relevance and effectiveness in diverse contexts.

It is important to note that the COMANAGE ECG Toolkit tools have been and will be in constant revision and improvement. The evolving nature of the energy sector demands ongoing adaptation and innovation. Therefore, the project partners are committed to continually refining and enhancing these tools to keep pace with emerging challenges and opportunities.

By leveraging the COMANAGE ECG Toolkit tools, stakeholders can overcome barriers, make informed decisions, and effectively collaborate to achieve their energy community goals. This collaborative approach, enabled by the tools and the Open Platform, fosters a sense of ownership, participation, and empowerment among stakeholders, leading to more sustainable and resilient energy communities. The COMANAGE ECG Toolkit tools provide a robust framework to empower stakeholders, facilitate successful project implementation, and promote long-term sustainability in energy communities. Through the COMANAGE Open Platform and the continuous efforts of the OIS Hubs, these tools will remain adaptable, relevant, and accessible to drive positive change in the energy sector.

The toolkit prototype developed has served as a crucial foundation for the final toolkit, detailed in this document. Through extensive fieldwork and engagement with the energy community pilots, the prototype has been refined to dynamically adapt to the ever-changing national landscape of energy communities and address the specific needs and challenges encountered in real-world settings. By leveraging the insights gained from the OIS Hubs that will be activate in KMA, AMB and ANCI LAZIO, hence, the final toolkit provides even more effective and user-friendly resources for facilitating usage and replication of energy community initiatives in the pilots' national territories (Spain, Italy, and Poland), and beyond. The ECG Toolkit provides guidance and support, enabling countries to benefit from the experiences and successes of the COMANAGE project, ultimately promoting the widespread adoption and growth of energy communities across Europe.

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12. Annexes

12.1. Matrix of social participation activities belonging to the Participation Plan

Challenge	Activity	Individuals/ Social collective	Barriers / issues	Possible actions to deploy
Communication	Group 1. Access to easy-to-understand information	Elderly living alone	<i>They do not leave their house</i>	<i>Posters at the supermarket</i>
		Unemployed people		
		Single mothers		
		Racialised people		
Participation	Group 2. Make them feel welcome	Elderly living alone		
		Unemployed people		
		Single mothers		
		Racialised people		
	Grupo 3. Ability to contribute	Elderly living alone		
		Unemployed people		
		Single mothers		
		Racialised people		
	Group 4. Time availability	Elderly living alone		
		Unemployed people		
		Single mothers		
		Racialised people		
Governance	Group 5. decision making processes	Elderly living alone		
		Unemployed people		
		Single mothers		
		Racialised people		
Economic participation	Group 6. Year membership	Elderly living alone		
		Unemployed people		
		Single mothers		
		Racialised people		

12.2. Gender Mainstreaming Quiz

COMANAGE - Gender Mainstreaming Quiz

Do you define yourself as... *

- ☐ Female
- ☐ Male
- ☐ Other
- ☐ Prefer not to say

What is the difference between **gender** and **sex**? *

0 points

- ☐ Gender refers to biological characteristics, while sex refers to socially constructed roles
- ☐ Gender refers to socially constructed roles, while sex refers to biological characteristics
- ☐ Gender and sex are the same thing
- ☐ Gender and sex are unrelated concepts

Gender roles are the set of societal expectations and norms that define how individuals should behave based on their gender. *

0 points

- ☐ True
- ☐ False

Which of the following statements best describes **intersectionality**? *

0 points

- ☐ The idea that gender equality can only be achieved by focusing on one aspect of a person's identity
- ☐ The concept that gender intersects with other social categories, such as ethnicity/origin, class, and sexual orientation, creating unique experiences of discrimination and privilege.
- ☐ Intersectionality refers to the belief that gender roles should be abolished in order to achieve equality.
- ☐ Intersectionality is a term used to describe the biological differences between men and women.

Which of the following is an example of a **gender stereotype** that can limit women's participation in certain fields or industries? *

0 points

- ☐ Men are naturally better at math and science
- ☐ Women are more compassionate and nurturing than men
- ☐ Women are not interested in leadership/decision-making positions
- ☐ All of the above

Gender equality refers to... *

0 points

- ☐ Equal treatment and opportunities for people of all genders
- ☐ The eradication of gender differences in society
- ☐ Giving women more rights and privileges

Which of the following is an example of **gender inequality**?

0 points

- ☐ Equal representation of men and women in decision-making positions
- ☐ Unequal pay for the same work based on gender
- ☐ Recognition and appreciation of diverse gender identities

Gender mainstreaming aims to:

0 points

- ☐ Promote women's empowerment and leadership
- ☐ Integrate gendered conditions, situations and needs differences into all policies and activities
- ☐ Eliminate gender differences entirely

Which of the following is **NOT** a strategy for promoting gender equality?

0 points

- ☐ Providing equal access to training and employment opportunities
- ☐ Challenging and questioning gender stereotypes
- ☐ Reinforcing traditional gender roles and expectations