



# Progress Report

**Sun4All D1.4 | June 2022**



Deliverable No.	<b>D1.4</b>
Project title	Eurosolar for all: energy communities for a fair energy transition in Europe (Sun4All)
Work Package	WP1
Dissemination Level	PU
Author(s)	Camila Canelas, Ecoserveis
Co-Author(s)	Aniol Esquerra, Ecoserveis
Contributor(s)	Joao Cleto, AGENEAL Raquel Rodriguez, Ecoserveis Immaculada Miracle, INES PFE Jurij Grizans, ICLEI Dorina Meyer, ICLEI
Due date	2022-06-30
Actual submission date	2022-06-30
Status	Final
Reviewer(s) (if applicable)	



This document has been prepared in the framework of the European project Sun4All – “Eurosolar for all: energy communities for a fair energy transition in Europe”.

This project has received funding from the European Union’s Horizon 2020 research and innovation programme under grant agreement no. 101032239.

The sole responsibility for the content lies with the authors. The content does not necessarily reflect the opinion of the European Commission. The European Commission is also not responsible for any use that may be made of the information contained therein.

## Contact

[info@sunforall.eu](mailto:info@sunforall.eu)

[www.sunforall.eu](http://www.sunforall.eu)

## Table of contents

<b>Abbreviations and Acronyms</b> .....	<b>4</b>
<b>Executive summary</b> .....	<b>5</b>
<b>1. Work carried out by the beneficiaries and overview of the progress</b>	<b>6</b>
1.1. Objectives .....	6
1.2. Explanation of the work carried per WP .....	7
1.2.1. WP1 – Project Management .....	7
1.2.2. WP2 – Business Model. From “Solar for all” programme to Eurosolar to all (Sun4All): designing the scheme in a European context .....	10
1.2.3. WP3 – User identification: criteria, eligibility, and engagement of beneficiaries	13
1.2.4. WP4 – Testing Sun4All program .....	15
1.2.5. WP5 – Sustaining transferability and upscaling .....	17
1.2.6. WP6 – Communication and dissemination.....	18
<b>2. Update of the data management plan</b> .....	<b>22</b>
<b>3. Deviations from Annex 1 and 2</b> .....	<b>22</b>
3.1. Tasks .....	22
3.2. Use of resources .....	23
3.2.1. WP1 .....	23
3.2.2. WP2 .....	24
3.2.3. WP3 .....	25
3.2.4. WP4 .....	26
3.2.5. WP5 .....	27
3.2.6. WP6 .....	28
<b>4. Conclusions</b> .....	<b>28</b>

## List of Tables

Table 1: WP1 deliverables and milestones status.....	8
Table 2: WP2 deliverables and milestones status.....	10
Table 3: WP3 deliverables and milestones status.....	13
Table 4: WP4 deliverables and milestones status.....	16
Table 5: WP5 deliverables and milestones status.....	17
Table 6: WP6 deliverables and milestones status.....	18
Table 7: Milestones summary table .....	22
Table 8: Deliverables summary table .....	23

## List of Figures

Figure 1: Deliverable's quality process .....	9
Figure 2: Infographic 1 .....	19
Figure 3: Infographic 2 .....	20

## Abbreviations and Acronyms

<b>ACRONYM</b>	<b>DESCRIPTION</b>
CoP	Community of Practice
D	Deliverable
DMP	Data Management Plan
GDPR	General Data Protection Regulation
M	Month
PM	Person-Month
RMP	Risk Management Plan
SO	Specific Objective
Sun4All	Eurosolar for all: energy communities for a fair energy transition in Europe
WP	Work Package
WPL	Work Package Leader

## Executive summary

This deliverable presents the first Progress Report for the Eurosolar for all: energy communities for a fair energy transition in Europe (Sun4All) project as defined in the Grant Agreement. This report aims to showcase the status of the project up to date, including all developed tasks, the use of resources, and possible deviations from the original plan. This report collects information from month (M) 1 to month 8, from October 2021 to May 2022, respectively.

This document is a first overview of the project, focused mainly on all tasks that needed to be completed for the proper implementation of the piloting phase in the four pilot regions. The progress Report makes it possible to foresee potential future deviations both in terms of actions and resources, this way, allowing to act beforehand to minimise the possible negative effects in the project implementation and in the expected impacts and results.

This document is organised in 4 sections, the first is focused on the work carried out by the project partners during this initial 8 months. This section includes an overview on the achievement of the project objectives and continues with a detailed explanation of the actions done. Then, the second section consists of an update on the Data Management Plan (DMP) of the project.

The third section is focused on deviations from the initial plans, both in terms of tasks and resources, including summary tables of the resources dedicated by each partner to each Work Package (WP). Finally, the document concludes with a fourth section that makes a wrap of the general status of the project both from a technical and a financial perspective.

It is worth noting that this document will be updated in M18, through the Periodic Report.

## 1. Work carried out by the beneficiaries and overview of the progress

This section aims to showcase the status of the project based on the achievement of the specific objectives together with the actions that have been carried out by the project consortium along the first 8 months of the project. Moreover, along this section it is possible to have an overview on what tasks have been done, which deliverables have been submitted, which milestones have been achieved, and which is the status of the work that is still to be done along the project lifespan.

### 1.1. Objectives

The main objective of Sun4All is to **facilitate access to renewable energies to vulnerable households**. Sun4All is adapting in Europe the existing New York's Solar for All scheme, as a means to guarantee a just energy transition. Sun4All aims to **stay as a permanent instrument** beyond H2020 to contribute to the **alleviation of energy poverty** in Europe by promoting active citizenship and generating inclusive community energy environments.

To achieve the general objective, five specific objectives (SO) have been defined.

**Specific objective 1:** Financial scheme implemented in 4 cities/regions with 1.200 direct beneficiaries receiving PV shares and involving more than 7.200 vulnerable consumers in EU

SO1 aims to adapt Solar for All (New York) existing programme in Europe, pilot and evaluate the impact in four different regions: Barcelona (Spain), Communes Coeur de Savoie (France), Rome (Italy) and Almada (Portugal). Currently, the first blueprints have been defined, together with the use cases for each pilot, considering the specific contextual characteristics. Additionally, engagement actions are being defined to make sure to reach the expected number of beneficiaries. As planned, implementation has not started yet.

**Specific objective 2:** Contribution to the identification of vulnerable consumers in Europe

SO2 aims to develop an eligibility criteria framework to identify vulnerable consumers that would benefit from the programme. Currently, the D3.1 details the eligibility criteria that will be followed in each of the pilot regions and the call and engagement strategies are being designed. It is worth noting that this information may be updated after the testing/implementation phase, mainly because it is intended to count with the active participation of beneficiaries to better understand the types and need of energy vulnerable households.

**Specific objective 3:** To guarantee the integration of those suffering a situation of energy poverty in an energy community and the participation of more than 7.200 vulnerable consumers in the energy transition

SO3 aims to create an energy community, to make sure that participants do not only enjoy the financial benefits but also get empowered and have a more active role as citizens on energy related aspects, feeling more included in society. Currently, as the implementation phase has not started this objective has not been achieved, nevertheless, current actions are focused on designing this energy communities to help in the tackling energy poverty in Europe.

**Specific objective 4:** To make Sun4All a stable programme to tackle energy poverty in Europe ensuring 10 more cities, regions or utilities implement the program and other 100 are identified as interested in Sun4All beyond 2020

SO4 aims to ensure the sustainability and transferability of Sun4All. Currently, project partners have started to work on the identification of (1) the 10 cities, regions or utilities that could act as replicators (Community of Practice (CoP) Observers' Group) and (2) synergies with similar projects and initiatives that could help on the replication of the Sun4All. Nevertheless, these actions become more active actions in the upcoming months when the implementation phase has started.

**Specific objective 5:** To provide policy recommendations to reach the inclusion of Sun4All in SECAP Action Plan of 4 cities and at least the inclusion of the scheme in 2 EU/National level plans or communications and in at least 5 working documents of interested organisations

SO5 aims to develop sound policy recommendations that contribute to alleviating energy poverty in the EU. Currently, there is not much work done related to these actions since the actions have been mainly focused on the adaptation of the model and the definition and design of the implementation plans and workplans. As previously stated, these actions will be more active once the implementation phase starts, we have been setting the grounds in these initial months.

## 1.2. Explanation of the work carried per WP

This sub-section aims to detail the work that has been carried from the beginning of the project (M1) until the end of May 2022 (M8). Information is presented by WP, first by a summary table containing the status of the different deliverables and milestones; and followed up by a narrative section, providing further details on the specific tasks per WP. Finally, a set of conclusions are drawn on the general status of each WP.

It is worth noting that the data showed below shows the status of the project at by the end of May 2022, not including activities incurred afterwards.

### 1.2.1. WP1 – Project Management

DELIVERABLE	STATUS
D1.1. Project management plan (M2)	100% - Submitted (M5)
D1.2. Risk management plan (M2)	100% - Submitted (M5)

D1.3. Data management plan (M1)	100% - Submitted (M8)
<b>D1.4. Progress Report (M9)</b>	<b>10% - In progress</b>
<b>MILESTONES</b>	<b>STATUS</b>
MS1. Definition of project Management plan (M2)	100% - Accomplished

Table 1: WP1 deliverables and milestones status

WP1 is coordinated by ECO and its main aim is to guarantee the proper implementation of the project, from a technical and financial perspective, ensuring the good quality of project results, together with the relationship within the project consortium.

### **Task 1.1 - Overall Project Management**

The work in WP1 was initially focussed on the general organisation of the project, through the definition and presentation of Work Package Leaders (WPL), teams, and the necessary management tools and procedures. Then, a big part of the work done within WP1 was the elaboration and submission of the horizontal deliverables D1.1 *Project Management Plan*, D1.2 *Risk Management plan (RMP)*, and D1.3 *Data Management Plan*.

Additionally, day-to-day actions have been done from mailing and general communication activities to organisation of consortium level and bilateral meetings to help the partners to perform and report their activities, to properly monitor the technical and financial progress of the project focusing on the achievement of the objectives. Finally, the distribution of the prefinancing was made timely and the quality control process was established and followed.

### **Task 1.2 - Reporting and Internal Communication**

As part of the over project management, an internal reporting has been defined to be done every 6 months, to have a better control of the status of the project both from a technical and a final perspective. Additionally, this type of internal reporting help identifying potential risks beforehand and have a good record of all activities done along the project, to guarantee the quality and accuracy on the project periodic reports.

The first internal reporting, comprising information between M1 and M6 help all project partners prepare the information for D1.4 *Progress Report*.

### **Task 1.3 - Quality Assurance and Risk Management**

D1.2 *Risk Management Plan* was elaborated and submitted detailing the Procedures to ensure project quality, coherence of results, risk minimization and management. The RMP includes a risk register where all identified risks are included, this register is updated on a regular basis to be able to act in case of risks are being materialized and also to include new response actions if necessary.

To guaranty the high quality of all project actions, a Quality Plan was defined and included in D1.1 *Project Management Plan*. The Quality Plan is being followed for



the elaboration and presentation of all project deliverables. This process consists of 8 steps:

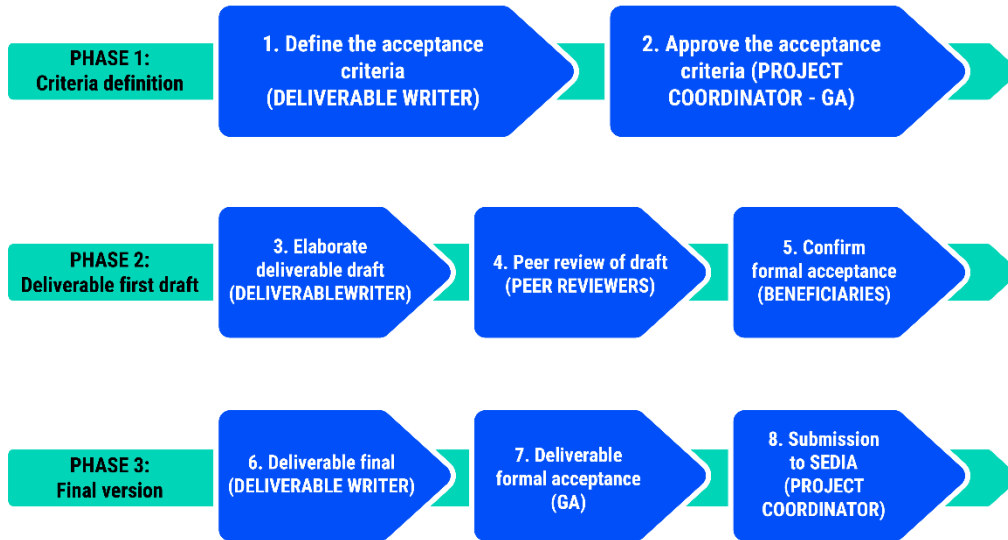


Figure 1: Deliverable's quality process

### Task 1.4 - Data Management Plan (DMP), data protection policy and GDPR compliance

D1.3 *Data Management Plan* was elaborated to establish the data management lifecycle for all data collected, shared, processed or generated by the Sun4All project, reflecting the state of consortium agreements regarding data management and the overall project results. Thus, presenting datasets descriptions, standards, data sharing and archiving guidelines. This document is essential during the execution of all project activities and elaboration of project deliverables and other documents.

At this point, the DMP is consists of an initial version which will most probably be updated along the project, once the Sun4All scheme is tested and new paths and requirements are identified. As part of the deliverable, some templates have been included for the proper data collection, management, and treatment.

### Task 1.5 - Common information and dissemination activities

Even being in an early stage, Sun4all was invited to be presented in IEPAW (International Energy Poverty Action Week) and in the Energy Communities Exchange Meeting on May 2022. Thanks to this presentation a collaboration with the energy community's repository has been reached to promote Sun4all tools through their platform.

## Conclusions

Project management was planned and executed with good results, even though there were some delays in the submission of the WP1 deliverables, the documents present high quality and the use of resources for their elaboration is line with the plan (see section 3). The provided tools were useful for the partners, allowing them to work in a collaborative manner and find the information necessary within the project repository.

It is worth noting that some communication problems existed within the consortium, due to internal organisation changes in some of the partners' organisations, leading to some of the existing delays.

Finally, as shown in Table 1, once this document is submitted, all WP1 deliverables will be submitted, and the only milestone will be achieved.

### 1.2.2. WP2 – Business Model. From “Solar for all” programme to Eurosolar to all (Sun4All): designing the scheme in a European context

DELIVERABLE/MILESTONE	STATUS
D2.1. Blueprint model for the Sun4All programme (M2)	100% - Submitted (M6)
D2.2. Revised version of blueprint model for the Sun4All programme: From Solar to All (M34)	0% - Not started
<b>D2.3. Implementation Plan of Sun4All programme in Barcelona, Rome, Communes du Coeur de Savoie and Almada (M10)</b>	<b>60% - In progress</b>
D2.4. Community of Practice Observer Group Activities Report (M34)	0% - Not started
MILESTONES	STATUS
MS2. Adaptation of the sun4all to Pilot cities (M10)	100% - Achieved
<b>MS3. Creation of the observer's Group (M12)</b>	<b>10% - In progress</b>
MS11. Blueprint for the sun4all Programme (M36)	0% - In progress

Table 2: WP2 deliverables and milestones status

WP2 is coordinated by AGN and its main objective is to set the framework to Adapt the Solar for All concept into the European context. It includes two main sub objectives: (1) set the theoretical and methodological common approach among all pilot cities (Barcelona, Communes du Coeur de Savoie, Rome and Almada); (2) define the model of implementation in each pilot region. In parallel, WP2 also sets up the Community of Practice Observer's Group.

Although WP2 extends throughout the overall duration of the project, 2 out of 4 deliverables and 1 out of 3 milestones are to be finished by month 10. Hence a large part of work related to tasks 2.1 and 2.2 was developed in the first months.

#### Task 2.1 - Adaptation of Solar for All to the European context

A series of 3 virtual transfer workshops with the NYSERDA Solar Department in New York (responsible of the Solar for All program) and a general guidelines

document were envisaged. These two sub-tasks are quite intertwined and were developed in parallel and fed into each other. A first virtual transfer workshop with an introduction of the scheme was held in the beginning of the project (October 2021) and the remainder two workshops were developed after the pilot partners, stakeholders, and WP2 leader started working on the adaptation of the scheme for a European and local settings. The 2nd virtual transfer workshop (March 2022) focused on peer learning and presentation of possible use cases by each partner followed by interactive discussions with the mentor, Max Joel from NYSERDA.

A 3rd virtual transfer workshop with NYSERDA, to collect and coordinate feedback from partners and finish the implementation plans templates per pilot, which will be the core of D2.3, has held at the beginning of May 2022.

The outputs and learnings of the virtual transfer workshops and peer learning process were included in the development of Deliverable 2.1 - *Blueprint model for the Sun4All program*, which was built by the WP2 Leader (AGN) with strong inputs from all pilot partners. It included a series of bilateral meetings between WP2 leader and the pilot partners to ensure the quality of inputs and a section dedicated to preparing the grounds for the upcoming task 2.2 Setting the program at different pilot sites. This was done by means of developing a Use Case framework that was adapted by each partner to its own specifications. A comparison matrix between the NYSERDA Solar for All program and the Sun4All pilots was also developed in an iterative and cooperative approach. The purpose was the identification in detail of the main characteristics of each of the pilots in confrontation with the Solar for All program, having also as a cross-reference the national and regional regulatory framework.

### **Task 2.2 - Setting the program at different pilot sites**

Most importantly but not exclusively, comprises an effective implementation plan for each of the pilot sites. A common template has been developed by WP2 leader and validated by the project coordinator, WP3, and WP4 leaders, given the strong dependency between this task and the tasks under development for the other WP's. It was agreed to include a section to cover data management and GDPR issues, since is one of the main actions to consider when designing the financial and data schemes, since many actors are involved and personal data from vulnerable citizens will be necessary. The work done by the pilots, regarding data management and GDPR aspects, will help improving the project DMP.

A special attention was given to check the status and critical issues of each pilot with WP4 leader so it eases up the implementation itself and the impact assessment methodology, but also the community action plan to be developed on WP3, since it should be quite interlinked with the implementation plan.

### **Task 2.3 – Community of Practice Observer´s Group**

The objective of Sun4All is to be sustainable and replicable throughout Europe. To ensure this goal, Sun4All will engage a Community of Practice Observer´s Group of at least 10 cities and utilities to follow the project and plan replication in their regions. ICLEI Europe is leading the implementation of the task T2.3. All project´s

partners are actively participating and contributing to this task. The time framework of the task T2.3 is from month M3 until the month M30.

To engage cities and utilities that will become members of the CoP Observer's Group, during the reporting period ICLEI Europe in close collaboration with all project partners has carried out the following works:

- **November 2021 – December 2021 – January 2022** – planning of the task T2.3 conceptual implementation. Presentation of the CoP Observer's Group member benefits package to the project partners. It covers the full scope of technical assistance, mentoring services, participation opportunities, etc. available to the members of the CoP Observer's Group. Discussion and opinion exchange with project partners on important characteristics of the potential CoP Observer's Group members that would be important to include in the selection criteria.
- **February 2022** – presentation of the classification results of the main characteristics of the CoP Observer's Group member profile to the project partners: (1) diversity of representation, (2) motivation and enthusiasm, (3) long-term capacity. Discussion and opinion exchange with project partners on the methodological aspects of the classification of the Sun4All Open Call selection criteria: (1) eligibility evaluation, (2) required qualification evaluation, (3) desirable qualification evaluation.
- **March 2022** – presentation of the main 9 steps to build the Sun4All Open Call timeline to the project partners. Discussion and opinion exchange with project partners on the design of the Sun4All Open Call evaluation and selection process: (1) basis for evaluation, (2) evaluators, (3) evaluation and selection process. Review of the draft of the Sun4All Open Call eligibility, required qualification and desirable qualification evaluation criteria.
- **April 2022** – second review of the Sun4All Open Call evaluation and selection criteria. Discussion and opinion exchange with project partners on the Sun4All Open Call next steps: (1) Open Call package documents, (2) Open Call technical solutions, (3) Open Call potential applicants. Discussion on the Sun4All Open Call timeline in correlation with the administrative, technical, and content level of preparedness of the Open Call.

Further implementation of the task T2.3 will cover the following steps:

- Open Call preparation & promotion.
- Call open.
- Advisory period for potential Observers.
- Info Webinar.
- Final Submission Deadline.
- Evaluation & Selection.

- Announcement of Observers.
- Act of Constitution.
- Active engagement and replication phase.

In parallel to the Sun4All Open Call preparation and implementation, one of the strategically important upcoming tasks is to design the Sun4All Engagement Programme for the CoP Observer’s Group members. The main aim of this programme is to support Observer cities and utilities in the preparation for the Sun4All programme adoption at the local level.

**Conclusions**

WP2 is progressing adequately, as in WP1 there has been a bit of delay in the submission of the D2.1, mainly because decisions can take longer when need to be approved by municipalities. At this point D2.3 is being prepared and will be ready to be submitted by the end of July.

It is worth noting there has been internal changes in AGN, something that was seen as a potential risk and that after setting bilateral meetings between ECO and AGN it is been agreed that this will not interfere in the quality of the project outcomes on the side of AGN and that ECO will provide some additional support to the upcoming tasks, at least during a couple months to help in the adaptation process of the new team.

**1.2.3. WP3 – User identification: criteria, eligibility, and engagement of beneficiaries**

<b>DELIVERABLE/MILESTONE</b>	<b>STATUS</b>
D3.1 Local requirements to benefit from Sun4All programme (M3)	100% - Submitted (M6)
<b>D3.2 Local work plans of community work (M10)</b>	<b>50% - In progress</b>
<b>MILESTONES</b>	<b>STATUS</b>
MS4. User identification and Engagement methodology (M3)	100% - Achieved
<b>MS5. Community workplan (M10)</b>	<b>50% - In progress</b>

*Table 3: WP3 deliverables and milestones status*

WP3 is coordinated by ECO and its main objective is to set the eligibility criteria to participate in the Sun4All program, to identify and engage the participants in the pilot regions, and to design a set of community actions.

**Task 3.1. Setting the eligibility criteria and conditions of participation**

During the first months of the project, the criteria necessary to select the people who will participate in each of the pilots have been defined. ECO held individual meetings with the pilot partners of each pilot in December (2021) and January (2022), in which the following topics were defined:

- The **criteria and the conditions of participation** for each of the pilots. With pilots' support potential users were defined together with their socio-economic characteristics, and the selection process that includes two phases:
  - Eligibility Criteria which set the minimum standards that potential beneficiaries must present. Those set of parameters and factors represent a strong exclusion criterion: people who do not fulfil the established requirements will not be able to access the announcement.
  - Evaluation Criteria which serve as a basis to choose and prioritize participants when the number of potential ones is attested beyond the maximum limit set by the project objectives and budget.
- The **recruitment strategy**, which means all the actions and circumstances through which a potential beneficiary is exposed to, or can access, information related to the project and the problems it seeks to tackle, to the process of registration. Recruitment thus encompasses issues as diverse as becoming aware of the project which will kickstart the implementation of the project's activities, while anticipating potential risks and threats and increase possibilities for users' retention.

The outputs of these bilateral meetings were included in the development of D3.1 *Local requirements to benefit from Sun4All programme*, to set the final eligibility criteria and how to reach and recruit all potential beneficiaries.

### **Task 3.2. Community work plan with beneficiaries**

We are currently working on this task.

- **May 2022** - In May began the definition of the Community Workplan that each pilot city will follow during the pilot development, regarding the activities that will take place during the 12 months of the pilot. A group session was carried out in early May with all pilots to share and brainstorm possible activities to be included in the Community Workplan for each pilot city. These activities are meant to be carried out with the beneficiaries during the pilot. The aim of this meeting was to share ideas and try to answer different questions related with the activities, such as: types of activities, the calendar of these activities, if it will be the same activities in the first and second year, the communication strategy with the beneficiaries to engage them during all the pilot, necessary resources for each one, etc.
- **June 2022** - After the group session, bilateral meetings with each pilot will be held to keep working in the Community Workplan and defining all the information necessary for D3.2 *Local work plans of community work*.
- **July 2022** - For the upcoming months, the outputs of these meetings will be included in the development of D3.2, to set the following information:
  - Recruitment actions which include channels, content, and strategies used to inform 1500 people about the programme and sequence of actions planned for the recruitment phase.

- Communication plan with channels, and personnel involved in the communication with already registered beneficiaries throughout the programme, and with broader community.
- Community activities (workshops, visit to PV installation, and energy advice sessions) that will be carried out during the pilot, including information such as the calendar and the resources required for each one.
- Engagement strategies to maintain the beneficiaries' interest, active participation and response to the various activities and tasks established by the programme.
- Mentoring, information on how the mentorship is going to be carried out.

### Task 3.3. Identification Call and engagement of potential beneficiaries

There is a little bit delay regarding the launch of the call.

- Almada is going to start the recruitment actions in July. They plan to have all beneficiaries recruited in October.
- Barcelona is the first pilot who has launched the call and started the recruitment actions for its first pilot building. The first informative session with potential beneficiaries is scheduled in June.
- Coeur de Savoie is going to launch the call in September. They plan to have all beneficiaries recruited in December.
- Roma is going to launch an open call in July. They plan to have all beneficiaries recruited in November.

### Conclusions

WP3 is progressing adequately. At the beginning there has been a bit of delay in the submission of the D3.1, mainly because decisions can take longer when need to be approved by municipalities. At this point D3.2 is being prepared and will be ready to be submitted by the end of July.

In some pilots there is also a bit delay in the launch of the call, for those cases, corrective measures are being considered so that it does not affect the development of the second year of the pilot.

## 1.2.4. WP4 – Testing Sun4All program

DELIVERABLE/MILESTONE	STATUS
D4.1 Monitoring Report on implementation (M24)	0% - Not started
D4.2 Final report on implementation (M34)	0% - Not started
<b>D4.3 Impact assessment Indicators and Guidelines to conduct the Evaluations (M10)</b>	<b>70% - In progress</b>
D4.4 Impact Assessment of Sun4All programme in Pilot Cities (M35)	0% - Not started

MILESTONES	STATUS
MS7. Sun4all testing results of the first round of pilots: Barcelona, Communes du Coeur de Savoie, Almada, Rome (M24)	0% - Not started
MS8. Evaluation (M35)	0% - Not started

Table 4: WP4 deliverables and milestones status

WP4 is coordinated by INES PFE and is focused on the implementation of the Sun4All scheme in the different pilot regions. At this point (M8), the implementation tasks (4.1, 4.2, 4.3, and 4.4) have not started yet. Activities related to this WP were mainly focused on the Task 4.5.

### Task 4.5. Evaluation of the pilots

The preparation of the impact assessment guidelines is an ongoing collective effort, coordinated by the UiS team. At the Sun4All online meeting in January 2022, the UiS team shared a first draft, presenting the main objectives and methodology of the Impact Assessment. Following very pertinent feedback from the Sun4All partners, a second, more detailed draft was shared, which included draft templates of the questionnaires. Bilateral meetings between the UiS team and each pilot partner were organized in March 2022. These meetings were an opportunity to discuss the timeframe, the mode of distribution of the questionnaires, the adaptation of the questionnaires to each pilot and the identification of public statistics available at different scales. The final version of the template of the Q1 questionnaire, was ready for distribution by the end of May.

The Impact Assessment guidelines have three main objectives:

- First, they aim at ensuring a comprehensive assessment of the Sun4all project. This will facilitate the continuous improvement of the scheme and the identification of best practices and challenges for future similar projects.
- Second, these guidelines aim at facilitating the production of relevant data and information on energy poverty, how to detect and alleviate it in different European contexts.
- Finally, these guidelines seek to ensure that the impact assessment raises awareness about energy poverty, renewable energies, and energy efficient practices amongst participating households and more widely.

The guidelines have identified three main inputs for the Impact Assessment:

- Questionnaires filled by the participating households, one before or as they join the program, another one after 10 months of joining
- Public statistics at the neighbourhood/district level and at the city/region level.
- Interviews conducted with volunteer households and pilot partners.

The questionnaires will be the main input for the impact assessment. Statistics and interviews will supplement and help contextualize the data gathered through the questionnaires.



In the upcoming months, the D4.3 *Impact Assessment Indicators and guidelines to conduct the evaluation* (M10) will be finished, will pass through the quality assurance process (peer-reviewing), and will be submitted.

## Conclusions

WP4 is being implemented correctly, without inconveniences. Nevertheless, potential delays in the starting time of some of the pilots have been identified, these delays will be discussed within the consortium, during the CM in Freiburg (M9) to see the best way to address them to minimise possible negative impacts.

Additionally, in the following months, INES PFE will meet with all pilots to start the recruitment of beneficiaries, testing the assessment questionnaires and the use cases defined in WP2, as well as setting the communication plan for local implementation.

### 1.2.5. WP5 – Sustaining transferability and upscaling

DELIVERABLE/MILESTONE	STATUS
D5.1 A comparative analysis of the regulatory framework in Sun4All pilot cities (M20)	0% - Not started
D5.2 Sun4all sustainable adoption roadmap for Europe (M33)	0% - Not started
D5.3 sun4 all capacity and training package (English version) (M24)	0% - Not started
D5.4 Guidebook to integrate Sun4All in Cities SECAPs (M30)	0% - Not started
D5.5 Policy briefs (local, national and EU) (M33)	0% - Not started
D5.6 Sun4All policy action report (M36)	0% - Not started
D5.7 Sustainable Adoption Plans for Pilot Cities (4 Plans) (M36)	0% - Not started
D5.8 Sustainable Implementation Plans for 10 CoP Observers (10 Plans) (M36)	0% - Not started
MILESTONES	STATUS
MS9. 10 cities working on their implementations plans (M30)	0% - Not started
MS10. Interest of new cities (around 100) in the programme (M33)	0% - Not started
MS12. Policy briefs reaches target Audience (M34)	0% - Not started

Table 5: WP5 deliverables and milestones status

The purpose of this WP is to ensure that Sun4All remains as a stable programme to tackle energy poverty and ensure vulnerable consumers participation in the energy transition in Europe. ICLEI Europe is leading the implementation of the work package WP5. Engagement and active contribution from all partners are crucially important for the successful implementation of the work package WP5. The time framework of the work package WP5 is from month M12 until the month M36. The work package WP5 includes four tasks and two subtasks.

One of the important characteristics of the work package WP5 is its knowledge cumulative nature. The knowledge gained through the currently ongoing work packages WP2, WP3, WP4 and WP6 contributes into better understanding of the Sun4All project area and create a basis for the Sun4All transferability and upscaling, i.e., for the implementation of the tasks of the work package WP5.

## Conclusions

This WP5 has not started at this point (M8).

### 1.2.6. WP6 – Communication and dissemination

DELIVERABLE/MILESTONE	STATUS
D6.1 Dissemination and Communication Strategy (M6)	100% - Submitted (M6)
D6.2 Visual identity (M5)	100% - Submitted (M5)
D6.3 Animated video (in English and 4 pilot cities' languages) and infographics (M8)	100% - Submitted (M8)
D6.4 Series of podcasts/video interviews (M36)	0% - Not started
D6.5 Report on Communication Activities (M36)	0% - Not started
MILESTONES	STATUS
MS6. Plan for networking and collaboration with related projects and initiatives (M7)	100% - Achieved

Table 6: WP6 deliverables and milestones status

WP6 is coordinated by ICLEI EURO and aims to effectively communicate and disseminate project outputs at local, national and EU level. During the first 8 months of the project, focus was on creating the foundations for the fields of communication and dissemination.

#### Task 6.1. Dissemination and Communication Strategy

This task comprised the development of the D6.1 *Sun4All Dissemination and Communication Strategy*, which specifies, amongst other things, the target audiences of the project communication activities, key messages, communication and dissemination channels and products, as well as the project partners roles and responsibilities within this work package. Following its creation, the document will be periodically reviewed to ensure its validity. ICLEI EURO and all project partners are responsible for coherent implementation of the strategy.

#### Task 6.2. Developing and Maintaining Communication and Dissemination Products and Channels

The development of the Sun4All visual identity constituted another important part of the foundation work executed during the first reporting period of the Sun4All project. The visual identity, which ensures a consistent and effective branding of the project, was summarized in project month 5, in the deliverable document D6.2 *Visual Identity* under subtask 6.2.1. It includes the logo of the project, templates, and guidelines for the project partners, as well as layouts for the project website.

Moreover, main communication and dissemination channels, such as the [Sun4All website](#), a [LinkedIn profile](#) and a [Twitter account](#) were set up. Through regular content updates and publications via these channels, ICLEI EURO ensures that all project stakeholders get informed on project-related topics, such as energy poverty and energy communities, and that external parties can follow the progress made in the project. To continue the development and maintenance of communication and dissemination products and channels (subtask 6.2.2) an animated project video and infographic(s) were developed by Ecoserveis and ICLEI EURO (D6.3 *Animated video and infographics*).

On the one hand, ICLEI EURO worked on all visual items, additional to the already provided ones, that could be used in other communication and dissemination materials to help explaining the project to interested parties. Some examples of these infographics are:

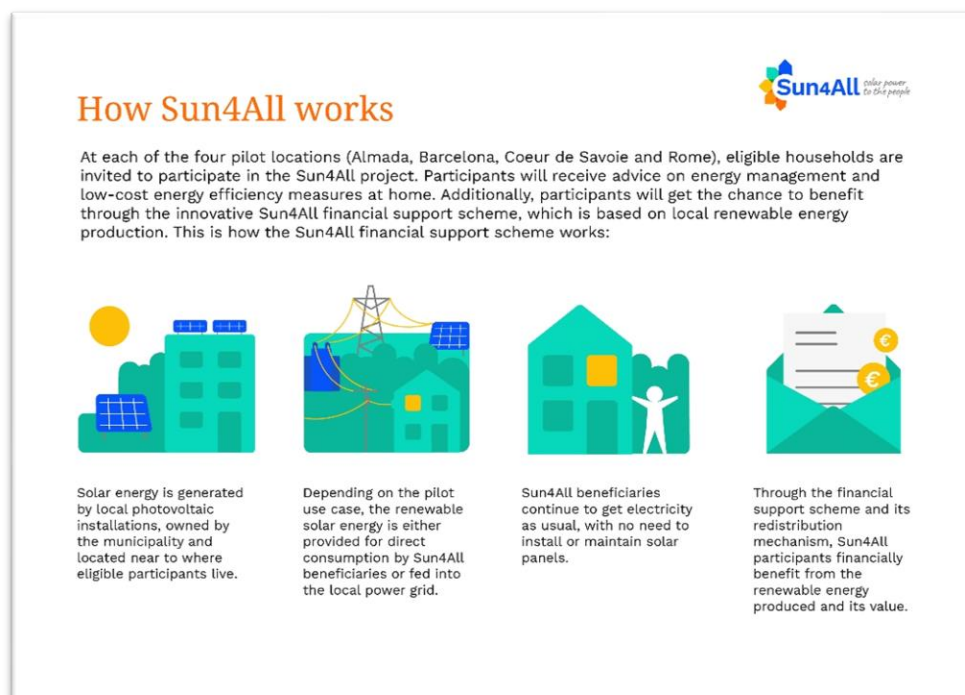


Figure 2: Infographic 1

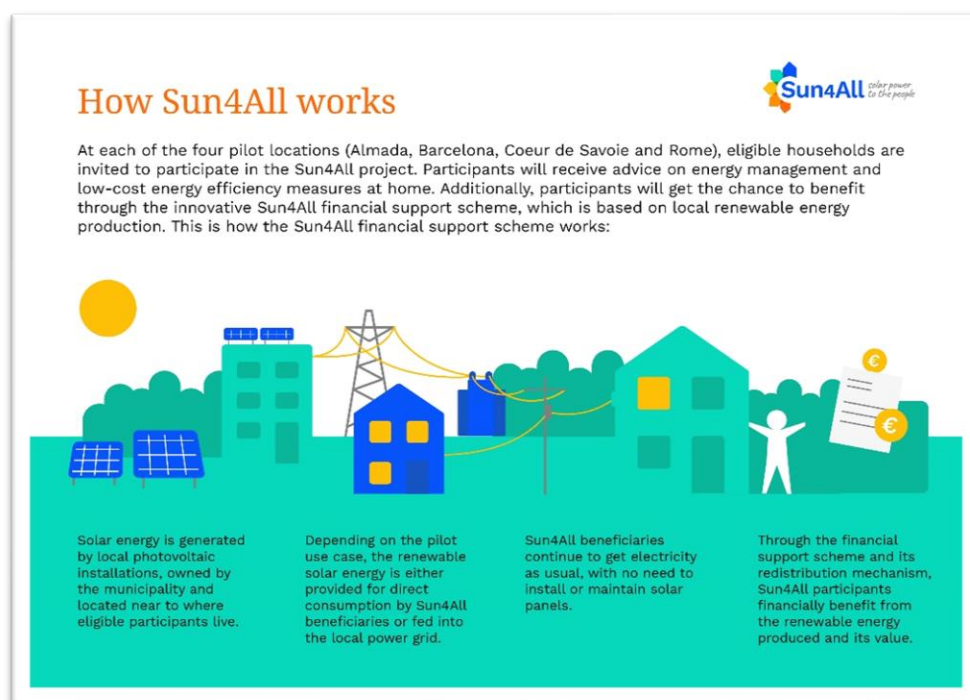


Figure 3: Infographic 2

On the other hand, ICLEI EURO together with ECO worked on a script for the video and validated it with the project consortium to guarantee that the languages used was both in line with the project communication message and was not too technical to make sure it is easily understandable by different actors. The objectives of the video, as well as for other communication materials are:

- Explain the particularities of the Sun4All project as a solution to alleviate energy poverty in an easy and understandable way so all users can understand what the project is aiming at.
- Give all the involved parties more tools to communicate the project (to stakeholders, families, people who are interested in being part of the project, etc).
- Encourage potential participants, who do not know anything about the project to be a part of the Sun4All programme and/or foster similar initiatives.

The video is available on the [Sun4All website](#).

ICLEI EURO has started to identify future events and third-party channels of interest for Sun4All representation and dissemination opportunities.

### **Task 6.3. Networking and collaboration with related projects and initiatives**

ICLEI EURO has developed a "Plan for Networking and Collaboration with Related Projects and Initiatives" (Milestone 6, due in project month 7), which indicates and

maps different initiatives in the field of energy poverty alleviation, energy transition and energy communities. This plan has been shared with the project consortium.

All project partners are aware and looking for opportunities with related projects and initiatives both to promote knowledge sharing and to disseminate the project and its results to a wider audience. The sister projects were identified by visiting the EU CORDIS website and using the following filters:

**Programme:**

- H2020-EU.3.3. Societal Challenges – Secure, clean and efficient energy
- H2020-EU.3.3.7. Market uptake of energy innovation – building on Intelligent Energy Europe
- H2020-EU.3.3.1. Reducing energy consumption and carbon footprint by smart and sustainable use

**Topic:**

- LC-SC3-EC-2-2018-2019-2020 – Mitigating household energy poverty

This way, 10 sister projects were identified to the Sun4All project and are more described in more detailed in the Plan for networking and collaboration (slide 48-53).

- Project „Actions to Mitigate Energy Poverty in the Private Rented Sector“ (ENPOR)
- Project „Empowering women to take action against energy poverty in the Mediterranean“ (EmpowerMed)
- Project „Empowering Energy Poor Citizens through Joint Energy Initiatives“ (POWERPOOR)
- Project „Tailored measures supporting energy vulnerable households“ (EnergyMEASURES)
- Project „Community Energy for Energy Solidarity“ (CEES)
- Project „Connecting Obligated Parties to Adopt Innovative Schemes towards Energy Poverty Alleviation“ (SocialWatt)
- Project „Social Energy Market Players to Tackle Energy Poverty“ (POWER UP)
- Project „Solutions to Tackle Energy Poverty“ (STEP)
- Project „Community Tailored Actions for Energy Poverty Mitigation“ (ComAct)
- Project „Raising summer energy poverty awareness to reduce cooling needs“ (COOLTORISE)

**Conclusions**

WP6 tasks are progressing adequately, in the following months focus will be placed on further establishment and use of Sun4All communication and dissemination

channels and products to enhance awareness for Sun4All among the defined target audience.

## 2. Update of the data management plan

At the moment, there are no revised versions of the DMP. As previously stated, more details on the specificities of each of the pilot regions concerning data management and GDPR aspects will be included in D2.3. It is foreseen that during the implementation phase some updates will be necessary to be done in the Sun4All Data Management Plan.

## 3. Deviations from Annex 1 and 2

This section consists of showcasing the existing deviations from the original plans from a technical and a financial perspective (Annex 1 and Annex 2)

### 3.1. Tasks

There have been some delays in the submission of project deliverables, but no deviations from the original tasks have occurred. The following tables summarise the progress of deliverables and milestones

#### Milestones

MS	Milestone	Month	Progress Status	STATUS
1	Definition of Project Management Plan	M2	100%	Achieved
2	Adaptation of the Sun4All to pilot cities	M10	100%	Achieved
3	Creation of the Observer's Group	M12	10%	In progress
4	User Identification and engagement methodology	M3	100%	Achieved
5	Community workplan	M10	50%	In progress
6	Plan for Networking and Collaboration with Related Projects and Initiatives	M7	100%	Achieved
7	Sun4All Testing Results of the first round of pilots: Barcelona, Communes du Coeur de Savoie, Almada, Rome	M24	0%	Not started
8	Evaluation	M35	0%	Not started
9	10 cities working on their implementations plans	M30	0%	Not started
10	Interest of new cities (around 100) in the programme	M33	0%	Not started
11	Blueprint for the Sun4All programme	M36	0%	Not started
12	Policy briefs reaches target audience	M34	0%	Not started

Table 7: Milestones summary table

## Deliverables

WP	Deliverable	Due Month	Progress Status	Delivery Month	STATUS
WP1	D1.1. Project Management Plan	M2	100%	M5	Submitted
	D1.2. Risk Management Plan	M2	100%	M5	Submitted
	D1.3. Data Management Plan (DMP) and data protection policy	M1	100%	M8	Submitted
	D1.4. Progress report	M9	10%	0	Draft
WP2	D2.1. Blueprint model for the Sun4All programme	M2	100%	M6	Submitted
	D2.2. Revised version of blueprint model for the Sun4All programme	M34	0%	0	Not started
	D2.3. Implementation Plan of Sun4All programme in Barcelona, Rome, Communes du Coeur de Savoie and Almada	M10	60%	0	Draft
	D2.4. Community of Practice Observer Group Activities Report	M34	0%	0	Not started
WP3	D3.1. Local requirements to benefit from Sun4All programme	M3	100%	M6	Submitted
	D3.2. Local work plans of community work	M10	50%	0	Draft
WP4	D4.1. Monitoring Report on implementation	M24	0%	0	Not started
	D4.2. Final Report on implementation	M34	0%	0	Not started
	D4.3. Impact Assessment Indicators and guidelines to conduct the evaluations	M10	70%	0	Draft
	D4.4. Impact Assessment of Sun4All programme in Pilot Cities	M35	0%	0	Not started
WP5	D5.1. A comparative analysis of the regulatory framework in Sun4All pilot cities	M20	0%	0	Not started
	D5.2. Sun4All Sustainable Adoption Roadmap for Europe	M33	0%	0	Not started
	D5.3. Sun4 All Capacity and Training Package (English version)	M24	0%	0	Not started
	D5.4. Guidebook to integrate Sun4All in Cities SECAPs	M30	0%	0	Not started
	D5.5. Policy briefs (local, national and EU)	M33	0%	0	Not started
	D5.6. Sun4All policy action report	M36	0%	0	Not started
	D5.7. Sustainable Adoption Plans for Pilot Cities (4 Plans)	M36	0%	0	Not started
	D5.8. Sustainable Implementation Plans for 10 CoP Observers (10 Plans)	M36	0%	0	Not started
WP6	D6.1. Dissemination and Communication Strategy	M6	100%	M6	Submitted
	D6.2. Visual Identity	M5	100%	M5	Submitted
	D6.3. Animated video (in English and 4 pilot cities' languages) and infographics	M8	100%	M8	Submitted
	D6.4. Series of podcasts/video interviews	M36	0%	0	Not started
	D6.5. Report on Communication Activities	M36	0%	0	Not started

Table 8: Deliverables summary table

### 3.2. Use of resources

The following tables summarise the use of resources reported by each project partners from M1 to M8. The numbers represent PMs (Person-month), showing on the one hand the foreseen dedication for the whole project in Annex I and the real number of PMs used.

It is worth noting that besides the project partners, the table includes the resources used by the third party IMSS. Additionally, reported data from RCP is an estimation since it was hard to be collected due to bureaucracy and internal changes in the municipality and more concretely in the team working in the project.

#### 3.2.1. WP1

##### Personnel costs

Partner	Initially foreseen PMs (Annex I)	Real spent PMs	Reasons for deviation
ECO	6,80	1,50	No deviations to justify
ICLEI	1,50	0,40	No deviations to justify
ALEB	1,00	0,44	No deviations to justify
CMA	1,50	0,32	No deviations to justify
AGN	1,50	0,29	No deviations to justify
INES PFE	1,50	0,44	No deviations to justify
CCCS	1,50	1,27	No deviations to justify
RCP	1,50	0,40	Information not reported
SAP	1,50	0,32	No deviations to justify
JDI	1,00	0,11	No deviations to justify
UiS	1,00	0,49	No deviations to justify
IMSS	0,00	0,00	Third party

### Unforeseen subcontracting

Not applicable

### Unforeseen use of in-kind contribution from third party against payment or free of charges

Not applicable

## 3.2.2. WP2

### Personnel costs

Partner	Initially foreseen PMs (Annex I)	Real spent PMs	Reasons for deviation
ECO	6,00	3,75	No deviations to justify
ICLEI	5,00	0,80	No deviations to justify
ALEB	1,00	0,68	No deviations to justify
CMA	2,00	1,61	No deviations to justify



AGN	4,00	2,46	No deviations to justify
INES PFE	3,50	0,92	No deviations to justify
CCCS	2,00	0,42	No deviations to justify
RCP	2,00	0,40	Information not reported
SAP	3,50	2,80	No deviations to justify
JDI	0,50	0,00	No deviations to justify
UiS	1,00	0,05	No deviations to justify
IMSS	0,00	0,00	No deviations to justify

### Unforeseen subcontracting

Not applicable

### Unforeseen use of in-kind contribution from third party against payment or free of charges

Not applicable

## 3.2.3. WP3

### Personnel costs

Partner	Initially foreseen PMs (Annex I)	Real spent PMs	Reasons for deviation
ECO	3,50	2,00	No deviations to justify
ICLEI	0,00	0,00	No deviations to justify
ALEB	1,00	0,67	No deviations to justify
CMA	2,00	1,43	No deviations to justify
AGN	1,00	0,73	No deviations to justify
INES PFE	1,00	0,40	No deviations to justify
CCCS	2,00	0,15	No deviations to justify
RCP	2,00	0,40	Information not reported
SAP	1,00	0,90	No deviations to justify

JDI	0,00	0,00	No deviations to justify
UiS	0,50	0,02	No deviations to justify
IMSS	1,00	0,10	No deviations to justify

### Unforeseen subcontracting

Not applicable

### Unforeseen use of in-kind contribution from third party against payment or free of charges

Not applicable

## 3.2.4. WP4

### Personnel costs

Partner	Initially foreseen PMs (Annex I)	Real spent PMs	Reasons for deviation
ECO	12,00	0,00	No deviations to justify
ICLEI	1,00	0,00	No deviations to justify
ALEB	1,50	0,03	No deviations to justify
CMA	6,00	0,00	No deviations to justify
AGN	6,50	0,00	No deviations to justify
INES PFE	7,00	0,02	No deviations to justify
CCCS	6,00	0,03	No deviations to justify
RCP	6,00	0,00	Information not reported
SAP	6,50	0,00	No deviations to justify
JDI	0,00	0,00	No deviations to justify
UiS	5,00	1,54	No deviations to justify
IMSS	0,00	0,00	No deviations to justify

### Unforeseen subcontracting

Not applicable

**Unforeseen use of in-kind contribution from third party against payment or free of charges**

Not applicable

**3.2.5. WP5**

**Personnel costs**

<b>Partner</b>	<b>Initially foreseen PMs (Annex I)</b>	<b>Real spent PMs</b>	<b>Reasons for deviation</b>
ECO	8,50	0,00	No deviations to justify
ICLEI	13,00	0,00	No deviations to justify
ALEB	0,50	0,02	No deviations to justify
CMA	1,50	0,00	No deviations to justify
AGN	4,00	0,00	No deviations to justify
INES PFE	4,00	0,00	No deviations to justify
CCCS	1,50	0,00	No deviations to justify
RCP	1,50	0,00	Information not reported
SAP	4,00	0,00	No deviations to justify
JDI	5,50	0,00	No deviations to justify
UiS	0,45	0,05	No deviations to justify
IMSS	0,00	0,00	No deviations to justify

**Unforeseen subcontracting**

Not applicable

**Unforeseen use of in-kind contribution from third party against payment or free of charges**

Not applicable

### 3.2.6. WP6

#### Personnel costs

Partner	Initially foreseen PMs (Annex I)	Real spent PMs	Reasons for deviation
ECO	6,00	1,00	No deviations to justify
ICLEI	14,00	9,09	No deviations to justify
ALEB	1,90	0,40	No deviations to justify
CMA	3,00	0,61	No deviations to justify
AGN	1,50	0,45	No deviations to justify
INES PFE	1,50	0,34	No deviations to justify
CCCS	3,00	0,27	No deviations to justify
RCP	3,00	0,40	Information not reported
SAP	1,50	0,20	No deviations to justify
JDI	2,00	0,00	No deviations to justify
UiS	1,00	0,05	No deviations to justify
IMSS	0,00	0,00	No deviations to justify

#### Unforeseen subcontracting

Not applicable

#### Unforeseen use of in-kind contribution from third party against payment or free of charges

Not applicable

## 4. Conclusions

As already informed, some problems have been faced related to the internal organisation and the complexities existing within some public entities (longer decision-making processes, less fluent communication flows...). These problems were overcome by the organisation of bilateral meeting and having a clearer definition of tasks and responsibilities within shorter periods, to guarantee a better follow-up and control.

The implementation of the Sun4All project is progressing well both technically and economically. From a technical perspective, all actions expected until M8 have been properly executed, resulting in some deliverables, which have been uploaded to the EU portal accordingly.

From a financial perspective, according to the reported PMs used by each partner, a 20% of the total budget of the project regarding personnel costs has been spent. Even though this report embraces information for the first quarter part of the project, as workload is not linear, the 20% is consistent with the expected, since the larger workload will come with the implementation phase and replication actions (WP4 and WP5).

