PANEL 2050

Stakeholder Engagement Template

Instructions

V2.0
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PROJECT REPORT

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1. PANEL 2050

PANEL model is a comprehensive approach for implementing local long-term energy management, supported by the community. PANEL model consists seven main elements: Stakeholder Engagement, Training Program, Guidebook, Long-term Energy Visions/Roadmaps/Action Plans and Central and Eastern European Sustainable Energy Network CEESEN. These elements are developed by PANEL 2050 project to support the CEE communities on achieving their sustainability goals. After initial implementation, PANEL model can be used by the forerunners in other regions inside and outside of EU. For more information visit ceesen.org.

PANEL 2050 project is taking multidisciplinary approach for combining the political theory with the technical discipline of energy planning. As an outcome, a set of tools – PANEL model - are created for supporting energy transition in local communities. Ten CEE regions will implement PANEL model during the project and will develop Roadmaps supporting local transition to low-carbon economy. PANEL 2050 project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 696173.

Stakeholder Engagement is taking a strategic approach for engaging the community to the local energy management. Stakeholders are invited to participate in the long term energy planning, bringing their knowledge and validation into the process. They are supported by engagement experts and capacity building activities.

Energy Advocacy Training Program will develop the skills of the stakeholders on active participation in sustainable policy development in their communities. Training Program will include the Curriculum in English and the training materials in many languages of CEE region. Local trainings are complemented by international Bootcamp for advocacy and networking.

Guidebook on Advocating Sustainable Energy in Central and Eastern Europe is compiling the important topics of energy advocacy and is complementing the training program. Guidebook is available in English and many other languages of CEE region.

Energy Visions, Roadmaps and Action Plans are the outputs of the long term energy planning process. Energy plans are developed with the organized support of stakeholders and forerunners that will take the initiative of implementing the plans in the future.

Forerunners will organize themselves as the members of Central and Eastern European Sustainable Energy Network (CEESEN) using the online platform ceesen.org, that will remain the basis for the future cooperation. The members of CEESEN can participate in international conferences and training, organized by the network.

2. Instructions

The Stakeholder Engagement Template aims to report and document the stakeholder engagement process throughout the whole project. The template will serve as a tool to carry out local stakeholder mapping. As stated in the job description for the Stakeholder engagement person, partners should:

- Identify relevant stakeholders from different sectors of society, including those who are supportive as well as those that could be considered 'opponents' to efforts, such as certain industrial actors. Special effort should be given to identifying stakeholders that are not engaged currently in energy transition but could have a great impact on the process.
- Develop strategies for reaching out to stakeholders they have previously not communicated with – and creating rebuttals to the claims or arguments made by opponents.
- Establish good personal communication with identified stakeholders and start networking as soon as possible.

The template should be used to document the results of this activity on a regular basis (at least weekly), so that it can be shared with the consortium and be used as inputs for the manual and for the training that will be offered.

a. Listing the Stakeholders worksheet

Excel Sheet 1, Annex 1

The first worksheet of the template contains crucial information about the stakeholders.

Column B should include the name of the organizations with acronyms and official identification number, through which the legal existence of the stakeholder can be proven.

Column C should specify the sectors such as Public Sector, Private Sector, Nonprofit Sector, using the drop down list.

- Public Sector includes all the governmental bodies, including the local government, state agencies, public network, plus all public corporations including the central bank.
- Private sector, includes organizations that are seeking profit, and is not controlled by the State such as different types of business companies.
- Non-profit sector includes all the Non-profit institutions that are legal or social entities created for the purpose of producing goods and services

whose status does not permit them to be a source of income, profit or another financial gain for the units that establish, control or finance them.

Column D should specify what type of stakeholder organization. Possible types include:

Local government - is a form of public administration that typically exists as the lowest tier of administration within a given state. Common names for local government entities could include state, province, region, department, county, prefecture, district, city, township, town, borough, parish, municipality, shire, village, and local service district.

State Energy Agency – governmental bodies that deal with coordination of energy suppliers and distributors and often are involved in the policy decision-making process related to energy issues.

Energy Service Providers energy service companies (ESCO or ESCo) are commercial or non-profit organizations that provide a broad range of energy solutions including designs and implementation of energy savings projects, retrofitting, energy conservation, energy infrastructure outsourcing, power generation, energy supply, and risk management.

Low-Energy Building Cluster – organizations that aims to accelerate the market penetration of low energy buildings and to increase the construction quality of new buildings, as well as of the renovation of existing ones. It could be either private, non-profit or based on public-private collaboration.

Energy Industries –all of the organizations involved in the production and sale of energy, including fuel extraction, manufacturing, refining, and distribution. Examples include:

- the petroleum industry, including oil companies, petroleum refiners, fuel transport and end-user sales at gas stations
- the gas industry, including natural gas extraction, and coal gas manufacture, as well as distribution and sales
- the electrical power industry, including electricity generation, electric power distribution and sales
- coal producers
- nuclear power plants
- renewable, alternative or sustainable energy companies, including those involved in hydroelectric power, wind power, and solar power generation, and the manufacture, distribution and sale of alternative fuels

- traditional energy industry based on the collection and distribution of firewood, the use of which, for cooking and heating, is particularly common in poorer countries.

Commercial Energy Interest Groups – commercial organizations produce, market, re-sell, or distribute the energy products or services consumed by users.

Commercial non-Energy Interest Groups –Other companies, especially those that are large energy consumers. In particular organizations such stock exchanges, financial institutions, banks, SMEs.

Umbrella Organizations - might gather civil society and non-profit institutions operating in a field of energy. In the context of private companies, they might be chambers of commerce, uniting SMEs and companies related to the scope of the field of our interest.

Higher Education Institutions - In HEI, we might consider universities, academies, colleges, and institutes of technology college-level institutions, including vocational schools, trade schools, and other career colleges that award academic degrees or professional certifications.

Advisory Service - advisory service advises current and future businesses prospects of clients. The logic behind of engaging that particular type of organizations is bringing their input in collaboration of business companies.

Grassroots groups - the type of organization that utilizes collective action from the local level to affect change at the local, regional, national, or international level. In particular, grassroots organizations might be neighborhood groups, self-help groups, local political campaign efforts local co-operatives, local cultural, ethnic, recreational, educational or issue-oriented groups, most networks and support systems, many local chapters of service clubs, particularly as they have flexibility and autonomy to choose programs, religious groups, especially as based on spontaneous initiatives of congregation members

Lobby Group – interest group that is precisely attempting to influence decisions made by officials in a government. Lobbying is done by many types of people, associations and organized groups, including individuals in the private sector, corporations, fellow legislators or government officials, or advocacy groups (interest groups).

Environmental Centers –organizations that act as environmental education centers to disseminate and educate people about nature and the environment. This type of organization is often referred to as nature centers.

Other – If it is not listed above, enter the organization type in the box.

Column E After determining the type of organization, the one should provide brief information about the core aims, fields of operation of the organization.

Columns F & G (Location) should provide precise current official information of address, including the GPS location of the organization. The following link is given to easily identify the GPS coordinates http://www.mapcoordinates.net/en

Column H (Contact information) and **Column I & J** (Contact Persons) should include the official communication information of the organization, as well as the contact information of contact person. Identification and setting up the communication with relevant stakeholder includes finding at least one contact person from the community. In some case it necessary to identify the more than one personal point of Contact for the organization.

In last columns, there should be indicated information about the previous interaction with stakeholder. Answering if the stakeholder is a new or old partner for the partner organization. Moreover, there should be indicated the methods of communication.

b. Mapping the Stakeholders

Excel Sheet 2, Annex 2

The second sheet of the Stakeholder engagement template serves for the preliminary assessment of stakeholders, addressing two core questions: such as:

- How supportive is the stakeholder to energy transition? (-6.0 Opponent to 6.0 - Supportive)

A stakeholder might strongly oppose energy transition because they think it will negatively affects their organization. How important their opposition is depends upon how much influence they have on over other stakeholders.

For example, if a large company that employs many people thinks that energy transition will reduce their revenue/profit they will be more significant opposition than a small company that does not think energy transition will negatively affect their profits.

Below is a scale with all of the possible ratings and what it means for the stakeholder.

-6.0	A Strong opponent of the transition vision and process. Their aims and operations are opposite to the vision and this group of stakeholders has direct influence and the power to block the transition action.

-5.0	Strong Opponent of the transition vision and process. Their aims and operations are opposite to the vision but this group of stakeholders has indirect influence and the power to block the action.
-4.0	Moderate Opponent of the transition vision and process. Their aims and operations are not very compatible to energy transitions. This Stakeholder has limited influence but the power to block the transition process.
-3.0	An opponent of the transition vision and process. Their aims and operations are not matching to energy transitions but this group does not have the will to support the transition. This group of stakeholder has limited influence but have a significant influence as a group to block the action.
-2.0	Opponent to the transition vision and process. Their opposite aims and operations are not matching to energy transitions. This group of stakeholders have limited individual influence and be remote as well as limited influence as a group to block the action.
-1.0	Weak opponent to the transition vision and process. Their opposite aims and operations are matching to energy transitions. This group of stakeholders has limited individual but no influence as a group to block the action.
1.0	Weak support to the transition vision and process. Their aims and operations are not precisely matching to the vision. Although, they are interested in supporting the energy transition but have no capacity to support the transition process.
2.0	Support to the transition vision and process. Their aims and operations are not precisely matching to the vision. Although, they are interested in supporting the energy transition but have no capacity to support the transition process.
3.0	Support to the transition vision and process. Their aims and operations matching to the vision. Although, they are interested in supporting the energy transition but have limited capacity to support the transition process.
4.0	Moderate support to the transition vision and process. Their aims and operations are matching to the vision. They are interested in supporting the energy transition but have the interest to be part of the process and limited capacity to support the transition process.
5.0	Strong support to the transition vision and process. Their aims and operations are matching to the vision. They are interested in supporting the energy transition but have the lower degree of

	interest to be part of the process and capacity to support the transition process.
6.0	Strong support to the transition vision and process. This means selected stakeholder is matching the mission and aims of the stakeholder in a field of the energy sector. They have long-term goals in transition vision and power to support the transition.

How deeply they will be affected by the transition? (1- low impact; 6 - high impact)

1	Energy transition will have no or minimal influence on stakeholder and it will not be any direct or indirect influence over the selected stakeholder. A low priority in the visioning process.
2	Energy transition will have a weak indirect impact on this particular group of stakeholders.
3	Energy transition will have an indirect impact on the individuals of the organization but the transition will not influence the operation of the stakeholder in any terms.
4	Energy transition will have a direct impact but not in a multiple way on the selected stakeholder. This mean that the policy transition will impact on individuals rather than the whole organization.
5	Energy transition has direct impact but partially in multiple areas on this particular group of stakeholders. There are still considered as a priority stakeholders that should be included in the visioning process.
6	Energy transition will have a direct and multiple impacts on selected stakeholder. The transition will have the long-term impact that will shape stakeholder performance, daily operations. High degree impact stakeholders are considered as a priority group in visioning the transition.

The grading logic should follow the coded narrative, but at the same time, partners are more than welcome to interpret the grading logic. Columns asking to explain the given mark serves for this purpose.

In the following part should be outlined the remarks, identifying the selected method of engagement, such as:

Informing – to provide the stakeholder with balanced and objective information to assist them in understanding the problem, essence of action, policy alternatives, solutions, and opportunities.

Consulting – to obtain stakeholders feedback on the action, created visions, analyzes, alternatives and decisions.

Collaborating – to partner with the stakeholder in each aspect of action, decision, including the development of visions, alternatives, and identification of preferred solutions.

Please, take into the consideration that the information included in this part of the template could be changed during the PANEL2050 action and by establishing several rounds of collecting the filled templates we will track the changes.

c. Objective of Engagement

Excel Sheet 3, Annex 3

The third part of the template is a logical continuation of stakeholder assessment part. As a reflection question, the one should think about the what could the specific role of selected stakeholders in the transition process and why there is need to engage them.

In this regards, identifying the objective of their engagement will guide partners to set the appropriate communication strategy and help us to ensure there are no hidden objectives or unstated hopes in the process of engagement. The overall objective of any public engagement exercise is to get effective public engagement that makes a difference to policy. In the template, the Justification of Engagement means listing Objective(s) and examples are provided in the template.

d. Log of engagement activity

Excel Sheet 4, Annex 4

In order to identify the weakness or strength of the engagement, it is import to record and document the process of stakeholder engagement. This particular part of the template should include the information about the every single action that was taken in communication with stakeholders. In most cases, it will be events, meetings of the stakeholders where the stakeholder engagement person should participate and establish a communication.

The first column should include Date of the event or another type of event and there should be provided the description of the activity.

e. Job Description of SEP

Stakeholder Engagement Staff Position from Partner Organizations

This job description outlines the role of the person who will carry out the local stakeholder mapping and participate in the WP2 workshops that will be held throughout the project. Under the actions of WP2 of PANEL2050 UT and TREA will conduct workshops with PANEL partners so that they will in turn be able to conduct trainings in their own language with stakeholders from their community and to eventually identify forerunners.

Who should be the Stakeholder Engagement Person?

PANEL partners are all in different situations, some partners already have the person identified who will communicate with stakeholders (and may have already begun to do so in relation to this project). Other partners will identify someone from amongst their staff to serve this function. A third possibility is that some partners may need to hire an additional person to carry out these tasks. In many cases, the Stakeholder Engagement position would be coordinating the activities of other staff of the organization who are communicating with stakeholders based upon their existing networking activities and contacts. To help partners in deciding which path to take – it was agreed at the Kickoff meeting that we would write up a list of the responsibilities of the position, which is described below:

Description of Responsibilities

Under the project lifetime the trainee person will be asked to:

- Identify relevant stakeholders from different sectors of society, including both those who are supportive as well as those that could be considered ‘opponents’ to efforts, such as certain industrial actors. Especially to identify the potential stakeholder that are not engaged current energy transition, but could have a great impact on the process.
- Create strategies for reaching out to stakeholders they have previously not communicated with – and creating rebuttals to the claims or arguments made by opponents.
- Establish good personal communication with the identified stakeholders and start networking as soon as possible. This means attending different meetings (i.e. Chamber of Commerce or trade associations). It also means setting up meetings with different stakeholders.
- Organization the creation of regional stakeholder maps (with input from other staff), which involves analyzing the different types of stakeholders and what their interests/stances are on the issues prioritized by the partner for their region. Stakeholder maps should also specify what roles the different stakeholders could play going forward.

- Participate in all WP2 Training activities, including attending scheduled Skype meetings with UT and CPU and the workshops that will be held in October and January on how to work with stakeholders and identify forerunners. A key part of this will be the participants sharing with each other the strategies that they used to identify and engage with stakeholders.
- Conduct trainings with local stakeholders (including staff from the partner organization if relevant)
- Identify key forerunners, who are (potential) leaders who would participate in sustainable energy planning and push for community change. Forerunners might include the Stakeholder Engagement person.
- Promote the proposed Eastern Europe Sustainable Energy Network amongst stakeholders, seeking to get them to join.
- Identify people to participate in International Advocacy Workshops which are focused on advocacy at the EU level. The Stakeholder Engagement person might also attend these workshops as well if relevant.
- An important part of the project is to analyze the different strategies used by partners, thus the person should document their efforts, which will be used in project reports and when developing training materials.
- Identify national-level and local (small, regional) media outlets that would be interested in covering the issue, establish a media contact list and good personal communication with key media
- Regularly communicate the progress of the work in the respective country to the leader of WP4 for the purpose of identifying and drafting possible press releases and generating website content

Based upon these responsibilities, the Stakeholder Engagement person ideally should have :

1. Have good communication skills and be willing and able to network with diverse people (government, business, NGO, community and media) on a regular basis.
2. Have an experience or willingness to conduct trainings.
3. Be organized and capable of documenting their activity and coordinating the activities of other members of the stakeholder involvement team, if required
4. Have knowledge of the energy-related issues being addressed (or at least be able to learn quickly about them).
5. Be open minded and willing to try different approaches to energy advocacy
6. Have an ability to communicate and write in English
7. Having experience in community outreach would be very useful.

8. Being aware of cultural context, socio-economic and political backgrounds of the country of their operation.
9. Have prior experience working with media or be willing to learn to communicate with them, e.g. by identifying stories of possible interest to media and drafting press releases

It is ok if your selected person does not have skills in all of these areas – gaps that they may have would be part of what we would focus on improving during the trainings. The key is that they have a willingness to develop these skills.

Time Commitment

The Stakeholder Engagement person should be actively engaging and meeting with stakeholders throughout the project. Every week they should be identifying methods for reaching out to different groups and documenting the results of this activity. Ideally they would make this part of their regular routine. They must make time for Skype calls that will be held monthly with UT and they should be able to attend all of the WP2 trainings held during the different project meetings. Based upon this, the Stakeholder Engagement person would ideally spend 1 to 2 days per week on this. Ideally the same person would participate during the whole lifetime of the project.

7. Annex 1. List of Stakeholders

List of Stakeholders										
The name	Sector of Organization	Type of Organization	Description of stakeholder	Location		Contact Information	Contact persons		The previous interaction with stakeholder.	Methods of communciation
Full name of stakeholder including the acronyms and ID-Number.	Please, specify the sectors such as Public Sector, Private Sector, Non-profit Sector	Please, specify the type of the organization when appropriate: Local government, Service Providers; Commercial Interest Groups: Low-Energy Building Cluster, Umbrella Organizations Universities, Advisory Service, Industries, distributors Energy Agency, Environmental Centre, Lobby Group,Grassroots Organization	What are the general activities of the stakehodler? Please state it as briefly as possible.	Please, specify the region or sub-divisions of the region or municipality. During the kick-off meeting, the partners agreed to sub divide the stakeholders based on geographical location.	GPS location. Use the following link to find location : http://www.mapcoordinates.net/en	Provide the detail contact information.	Please, provide the contact information of contact person. Identification and setting up the communication with relevant stakeholder includes finding at least one contact person from the community	Please, provide the contact information of second contact person when appropriate.	Please, provide the previous cooperation when appropriate. Is the stakeholder new or old partner for your organization? New Contact (yes or no)	What is the method of communciation that you are using? Is it email, phone or in person communication?

8. Annex 2. Preliminary assessment of stakeholders

Stakeholder list							
nr	Stakeholder (Including the acronyms)	How supportive the stakeholder is to the energy transition? (-6.0 Opponent to 6 - Supportive)	Explain why you give this number.	How deeply they will be affected by the transition? (1- low impact; 6 - high impact)		Explain why you gave this number.	Remarks (how to engage them - inform, consult or collaborate)*

9. Annex 3. Objective of Engagement

Critical Questions:

What is the specific role of selected stakeholders in the transition process and why there is need to engage them?		
Nr	Stakeholders (Full name of stakeholder including the acronyms and ID-Number)	Justification of Engagement (Please provide the objectives of engagement of stakeholders listed prevousely)

10. Annex 4. Log of engagement activity

Please, provide the information about the activity			
Nr	Date	Description of activity	Stakeholder engaged with

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