life comet
Energy communities working together

Toolkit for energy community service providers

Deliverable 4.1

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Executive summary

This document is an **indicative, experimental, and operational toolkit** developed to support the implementation of **Community Energy Service Points (CESPs)** within the framework of the **LIFE COMET project**. Its primary purpose is to help organisations design, launch, and operate CESPs that effectively lower barriers for citizen-led energy initiatives, accelerate the uptake of energy communities, and enable energy sharing schemes across different national contexts. It provides concrete steps, decision rules, checklists, guidelines, and service design tools that reflect real-life constraints, emerging markets, and varying levels of institutional maturity. Rather than prescribing a single model, the document offers **modular building blocks** that can be adapted to local regulatory, market, and organisational conditions.

The toolkit is intended for:

- organisations establishing a CESP for the first time or expanding support services,
- existing service providers scaling or professionalising their support for energy communities.

The purpose is not to provide abstract guidance, but to support **real operational delivery** of services to energy communities across different market and institutional contexts.

The document combines three layers:

1. **A way of thinking** about CESPs as operational systems (strategy, positioning, decision-making).
2. **Hands-on operational guidance** for setting up and running services.
3. **Practical tools and guidelines** that can be directly applied in daily work.

The toolkit is modular by design. Not all CESPs need all services, and not all services should be delivered from day one. To support this, the document is structured around a **CESP lifecycle logic** and a **Minimum Viable Operative System (MVOS)** approach, helping readers distinguish between what is essential, what can be added later, and what may not be required in each context.

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LIFE-COMET Project Profile

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What's in this toolkit?

This toolkit is designed as a **practical, modular guide** for organizations and practitioners who are considering:

- **Opening a new Community Energy Service Point (CESP)**, or
- **Expanding, restructuring or professionalizing an existing one.**

It is not assumed that all markets are mature, nor that all organizations start with strong capacity. Instead, it helps you build a CESP step by step - from minimum viable structure to a fully operational, scalable system of services.

You can read the toolkit linearly, but it is structured so that you can also **enter the chapter most relevant to your current stage of development**. Below is a guide to help you navigate it strategically.

Chapter 1 – Introduction to Community Energy Service Points

If you are starting from scratch, this chapter is essential.

It establishes the conceptual and strategic foundation of Community Energy Service Points (CESPs). It explains the structural barriers that prevent citizens and local actors from developing energy communities, such as fragmented information, weak readiness, regulatory complexity. It also clarifies how CESPs function as enabling infrastructure rather than simple advisory desks and gives you an insight into the phased evolution of CESPs as markets mature.

The chapter frames the CESP model around three core elements:

- Diagnosis of systemic barriers
- Guiding policy for intervention
- Coherent operational actions

All this helps you define your mandate, scope and long-term positioning within the broader energy ecosystem.

Chapter 2 – Overview of existing service delivery models

If you are designing your institutional model or negotiating with public authorities, this chapter is particularly valuable.

It analyses real-world models from: Austria (publicly led model), the Netherlands (community-driven federation model) and Slovenia (hybrid and emerging model) as well as EU-level initiatives such as the Clean Energy for EU Islands Secretariat and the Energy Communities Repository.

Through these examples it demonstrates how service delivery structures vary depending on market maturity/context, regulatory frameworks and institutional culture. The purpose of this chapter is not to promote replication of any single model, but to provide comparative insight and understanding of what works and how CESPs function in mature vs. early-stage markets or to benchmark your ambition against realistic examples.

Sub-chapter 2.3. translates the elements of comparative analysis into practical CESP building blocks to help you design your roadmap for gradual development. It identifies 9 recommended structural CESP components, ranging from digital entry points to expert networks and monitoring mechanisms, that can be combined progressively for your specific CESP needs, depending on available capacity, funding and market maturity.

Chapter 3 – Practical structure of CESPs

This chapter is the organizational backbone of the toolkit and is especially useful for leaders and coordinators.

If your team is growing or struggling with unclear roles, this chapter is critical. You will gain insights about clear separation between strategy and operations, protection against operational overload and risk management logic.

This chapter focuses on internal organisation and governance. It outlines how CESPs can structure roles, responsibilities, and decision-making processes to avoid overload, duplication, and mission drift. **It defines clearly**

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what a CESP does and what it does not do, and it provides a scalable organizational blueprint adaptable to both emerging and mature service environments.

Sub-chapter 3.1 provides a detailed breakdown of the internal layers that make CESP operationally resilient and strategically coherent. Drawing on organizational theory and real-life service structures, it defines key CESP layers, including: i) Strategic apex, ii) Coordination layer, iii) Operating core, iv) Expert pool and v) Support staff. It also clarifies how these layers interact, how decision-making authority is distributed and how to create clarity of roles while preserving flexibility in low-capacity contexts.

Sub-chapter 3.2 moves focus from structure to implementation, and it outlines the essential practical steps required to establish a functioning CESP including: i) Internal capacity building (cross-training, knowledge management); ii) Online rollout (website, intake, CRM); iii) Partnership development and iv) Marketing and communication strategy.

If you are launching or restructuring CESP, this chapter translates vision into action. It includes practical reflection questions to test readiness and identify structural gaps.

Chapter 4 – Delivery of the CESP system of services

This chapter explains how services are delivered in practice.

Sub-chapter 4.1 introduces the operational logic is the backbone of daily service delivery. It defines how inquiries are transformed into structured cases, how decisions are made, and how coordination is maintained throughout the project lifecycle. The identified building blocks include including: i) Entry to the service: intake, triage and qualification, ii) Decision making and service packaging, iii) Operational implementation and coordination, iv) Monitoring, follow-up and learning and v) Tools and support systems. By structuring service delivery into clear phases, this section ensures that CESPs remain disciplined, transparent and scalable while responding to real user needs.

Sub-chapter 4.2 provides step-by-step guidance for designing CESP services in a structured and manageable way. It walks you through defining service scope, mapping user journeys, setting intake rules, prototyping and scaling. The emphasis is on building services that are deliverable, understandable and adaptable rather than overly complex or aspirational.

Sub-chapter 4.3 presents the range of potential services CESP may offer across different development phases of community energy initiatives including: i) Informing & Mobilisation (Initiation phase), ii) Advisory & legal support (planning phase); iii) Technical support (development phase); iv) Financial support (financing phase); v) Stakeholder facilitation & project management; vi) Digital & data services and vii) Post-implementation & monitoring support. By distinguishing between mandatory and auxiliary services, it enables CESPs to prioritize realistically and align service offerings with available capacity and market needs.

Sub-chapter 4.4 addresses the long-term institutional and financial sustainability of CESPs. It provides basic insight into funding models, cost recovery mechanisms, partnership structures and strategic positioning necessary to maintain operations beyond initial project funding. Sustainability is treated not as an afterthought but as a design principle embedded from the outset.

Chapter 5 – Checklists and guidance for successful service delivery

This chapter translates strategy into operational discipline. It is particularly useful for teams already operating but seeking higher efficiency.

It transforms informal practices into professional service systems and provides guidance about practical tools and operational discipline mechanisms such as i) Case intake and case handling; ii) Partner engagement; iii) Operating rules and service discipline; iv) Communication logic and user motivation; v) Learning, feedback and system

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improvement and vi) Guidelines and operational tools., that ensure consistent service quality. The aim is to transform informal support practices into reliable, professional service systems.

Chapter 6 – Prototyping a minimal viable operating system (MVOS)

This chapter helps you start small. It is good fit for emerging markets or early-stage organizations, that cannot deploy a full-scale CESP immediately.

It explains how to identify the minimum necessary components, launch CESP in a structured but lean way and scale progressively based on demand and learning. This enables functional structure that delivers core value while remaining adaptable. By focusing on sequencing and prioritization, it empowers you to start pragmatically, without waiting for perfect conditions, and scale responsibly.

Chapter 7 – References

This chapter lists the sources, research materials and conceptual frameworks that underpin the toolkit.

Chapter 8 – Annex: CESP service blueprint

The annex provides a visual representation of the CESP service architecture, linking user-facing interactions with internal processes and governance structures.

How to Use This Toolkit Strategically

You do not need to implement everything at once.
If you are:

- **Starting from zero:** → Focus on Chapters 1, 2.3, 3 and 6.
- **Improving an existing CESP**: → Focus on Chapters 3, 4 and 5.
- **Designing service architecture**: → Prioritize Chapters 3 and 4.
- **Building political or funding support**: → Use Chapters 1 and 2 as your narrative foundation.

The toolkit is meant to reduce improvisation, protect capacity, and turn good intentions into structured impact.

A Final Word: Start Building

Establishing a Community Energy Service Point is not a small task. It requires strategic clarity, operational discipline and patience - especially in markets where energy communities are still emerging. But CESPs are not just service desks. They are enabling infrastructure for citizen participation in energy transition. They reduce confusion, lower risk, build trust and gradually create functioning markets where none existed before.

You do not need perfect regulation. You do not need a large team. You do not need full funding secured for five years. **You need a clear mandate, a minimum viable structure, and the commitment to learn and adapt.** Start with one service layer. Define your intake logic. Build one partnership at a time. From there, structure replaces improvisation, and momentum replaces hesitation.

The energy transition needs organized citizens and well-designed CESP is one of the most powerful tools to make that possible.

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1. Introduction to Community Energy Service Points

Community Energy Service Points (CESPs) emerge as a response to persistent structural barriers that prevent citizens and local initiatives from translating interest in renewable energy into operational projects. Across multiple EU countries, fragmented information, unclear procedures, limited access to impartial expertise, and weak coordination between public authorities and market actors create a high threshold for engagement. While individual pilot projects may succeed under favourable conditions or external funding, the absence of a stable support structure results in low replication, slow learning, and limited market formation.

CESPs address this gap by acting as institutional intermediaries between citizens, public authorities, and the energy market. Their role is not limited to providing information or consultancy, but to systematically reduce complexity, de-risk early-stage initiatives, and enable consistent pathways from idea to implementation. In this sense, CESPs function as enabling infrastructure rather than isolated service providers.

The strategic foundation of the CESP follows the structure proposed by Richard Rumelt in "Good Strategy, Bad Strategy"[1] including 1) a diagnosis that clearly defines the nature of the challenge, (2) a guiding policy that outlines the overall approach to overcome the obstacles, and (3) a set of coherent actions to implement the policies. The CESP's approach reviews these elements:

A) Diagnosis: Using diagnosis to understand the core challenges

- **Fragmented information & unclear procedures:** Existing national programmes and guidelines are inconsistent or not easily accessible, leading to confusion among potential community energy initiators.
- **Low readiness levels of citizen initiatives:** Grassroots groups and oftentimes even experts often lack organisational capacity, legal expertise, or financial knowledge to start energy-community projects.
- **Limited expert access:** There are few easily reachable experts who can provide impartial, first-level advice to new initiatives, and horizontal outlook on seemingly complex undertaking of including citizens in sustainable projects.
- **National context:** Research within Life COMET project shows that across Croatia, Estonia, Hungary, Poland, Romania and Slovenia energy communities remain at minimum maturity (level 2) while Greece has reached moderate maturity (level 3). Common barriers include regulatory gaps, limited or no financial incentives, weak business models and low stakeholder engagement, which collectively limit the number of energy communities and the creation of a sustainable market while the citizens are burdened with personal challenges and other priorities that don't include participation in energy sector.

B) Guiding policies: Creation of overall approach for CESP

- **Simplicity and standardisation:** The CESP design focuses on straightforward processes with harmonised templates and tools to remove complexity and reduce administrative burdens.
- **Building capabilities of national partners:** In each partner country, the project aims to create network that engages stakeholders to simplify procedures and create better conditions for citizen participation in renewable projects.
- **Clear prioritisation of services:** Three core service layers or packages were identified in this phase:
    1. **Informing:** A unified landing page with easy-to-navigate resources (FAQs, legal guidelines, basic "how-to" guides).
    2. **Advising:** First-level consultancy and capacity building via a help-desk or contact point to answer legal, technical and financial questions.
    3. **Accelerating piloting initiatives:** Advanced tailored support for promising projects—connecting initiatives with funding opportunities, mentors and training.

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C) Coherent actions: to enhance the implementation of the guiding policies

- **Unified landing page & standardised templates:** A single online entry point provides harmonised forms (for grant applications, project descriptions, peer-learning requests) and capacity-building materials.
- **First-level consultancy and peer-to-peer support:** A help-desk staffed by experts answers baseline questions. Peer-to-peer mechanisms allow experienced initiatives to mentor newcomers.
- **Promotion & capacity building:** Outreach activities (webinars, local workshops, media campaigns) raise awareness; training programmes and online tools help initiatives improve readiness.
- **Coalition-building and policy recommendation:** Partners engage national authorities to establish supportive mechanisms and simplify regulatory procedures. They provide continuous feedback from the field, promote the service point, and involve public bodies in early projects.

Why are CESPs directed with strategic approach?

- Without a clear strategy, the CESP quickly turns into an unlimited helpdesk, which overwhelms the team and reduces impact per case.
- Strategy translates complexity into repeatable decisions: what we do, what we don't do, and what we escalate it enables services to stay neutral, credible and scalable.
- A strategic frame prevents "random acts of support" by forcing every tool (intake, triage, packaging, expert activation) to serve the same outcomes and learning loop.
- In low-maturity markets, strategy is the only way to protect capacity: it sets prioritisation rules early, before demand spikes and politics start steering the agenda.
- Operationally, strategy is a time-saving device: it reduces case-by-case improvisation and enables faster onboarding of new staff and partners into one consistent way of working.

CESPs do not emerge fully formed. Their structure and role evolve alongside the maturity of national and regional energy community frameworks. In pre-market phases, CESPs primarily focus on information provision, awareness raising, and the identification of systemic barriers. As markets begin to develop, CESPs shift towards structured advisory services, pilot acceleration, and coordination between emerging actors. In most advanced stages, CESPs increasingly act as quality assurance mechanisms and strategic coordinators rather than direct service providers for funding bodies previously inexperienced in evaluation and management of new market players. This phased evolution allows CESPs to remain relevant over time adapting their functions to changing market conditions.

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2. Overview of existing service delivery models

2.1 Service delivery models comparable to CESPs

The design and assessment of national Community Energy Service Points is partially based on an analysis of existing CESP frameworks and service delivery models and on partner's national experience delivering or having indirect experience in support service delivery. This analysis focuses on how CESPs are structured, their services, how to define internal roles and processes, and respond to the needs of citizens, local authorities and emerging energy communities. Attention is given to identifying common patterns that support clarity, accessibility and operational consistency, while recognising the need for adaptation to national and local contexts. Further contextual insights on national enabling environments, as well as COMET-developed approaches to coalition-building and service provision, can be found in the project's national reports and coalition roadmaps.[1] In addition, the CESP models developed within COMET will be made publicly available via the project's website resource pages[2].

During analysis several preconditions of successful CESPs were identified:

- There is a developed market of energy communities (EC) or energy sharing (ES). An existing regulatory and financial framework enables the service provision (e.g. legally defined energy communities, access to financing mechanisms, market conditions that enable diverse and sustainable business models).
- Key stakeholders, such as local authorities, DSOs, financial institutions, and contractors, are open to partnership and adoption of new market models of ECs and ES.
- *Sufficient capacity of the organisation leading the CESP, including expertise, human resources, and an operational digital and physical solutions. A focus of this document.*

This chapter presents the research and ideation process for developing Community Energy Service Points (CESPs). It is based on desktop research, participation in relevant workshops, and stakeholder consultations on service provision for energy communities. Existing service delivery models comparable to CESPs were analysed, with the most relevant and mature examples aligned with project objectives presented below:

- CESP as a publicly funded service provider (Austria),
- CESP as a privately operated service provider (Netherlands),
- CESP as a hybrid model of service providers (Slovenia).

[1] D3.1 *National reports on Energy Community development in Croatia, Estonia, Greece, Hungary, Poland, Romania, and Slovenia* (publicly available at: https://lifecomet.rescoop.eu/resources/national-reports-on-status-for-energy-community-development)
D2.3 *National Coalition Roadmaps* (publicly available at: https://lifecomet.rescoop.eu/resources/national-community-energy-coalitions-roadmaps)

[2] https://lifecomet.rescoop.eu/resources

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2.1.1 CESP as a publicly funded entity (Austria)

Austria has experienced a rapid growth in energy communities, with around 4,000–4,600 active energy communities reported in recent years. The state has utilized energy communities and energy sharing as a systemic solution to rapid energy price growth on the market and to mobilise private capital to speed up decarbonisation with more than 50 different providers of services to ECs on national level. Simplified energy sharing models and surge of energy prices with strong national and private support enabled one of the more impressive results in EU and growth of service providers. Further analysis is provided in Table 1.

Table 1. Austria – state led CESP [6, 7]

Challenges and focus of CESP:	Austria is among the frontrunners in the operational implementation of energy community concepts. However, despite advanced legislation and regulatory frameworks, administrative challenges and the need for coordination have been identified as ongoing issues. The focus of the Austrian CESP model is on removing complex procedural barriers and providing unified support to make the establishment and operation of energy communities as simple and accessible as possible.
How is it structured	A National Coordination Office for Energy Communities (Austrian Coordination Office for Energy Communities) has been established under the auspices of the federal government, functioning as a centralized online one-stop shop for energy communities. This office connects key institutions—the Ministry for Climate Policy, the national regulator (E-Control), and regional authorities—ensuring a coherent approach and coordinated action at both national and provincial levels. In addition to the national office, regional energy agencies play a crucial role. One example is the OÖ Energiesparverband in Upper Austria, which operates an energy communities centre within its service portfolio and provides on-the-ground advisory support. With that, additional private service providers operate in field in the process of project development with relevant costumers. Financially stable construction of energy communities enabled growth of regional service providers for citizens simplifying the entry point to RES and EE investments.
Services provided	The Coordination Office offers a broad range of services to energy communities, including online guides and start-up guidelines (legal information, model statutes, contracts), information on financing opportunities and project examples, an interactive map of active communities, and a helpdesk for inquiries. In cooperation with public advisory institutions at the provincial level, the office aims to accelerate administrative procedures and provide timely responses, including connecting initiatives with experts where needed. Regional agencies such as the OÖ Energiesparverband provide technical, financial, and organisational advisory services at the local level—for example, in Upper Austria more than 1,100 individual advisory sessions (by phone, online, or in person) on the establishment and operation of renewable energy communities have been delivered. They also organise workshops, training sessions, and networking activities (e.g. OÖ Energiesparverband organised 21 dedicated events on energy communities, reaching more than 3,200 participants). Office hosts many private service providers to the energy

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	communities and many of them are also initiators of RES projects looking to integrate citizen component into their projects.
Supporting environment	The adoption of the Renewable Energy Expansion Act (EAG) in 2021 established the legal basis for Renewable Energy Communities (RECs) and Citizen Energy Communities (CECs) in Austria. The legislative framework enables energy sharing within communities without the need for a supply license, introduces incentives such as reduced grid fees and premiums for surplus energy, and defines obligations for distribution system operators (DSOs) to prioritise support for community connections (e.g. rapid meter installation and access to data for members). The federal government allocated EUR 4 million in support for the establishment of energy communities, and investment subsidies for renewable energy installations are also available to communities under the same conditions as for other market actors. Thanks to advocacy by regional energy agencies, additional smaller-scale incentives were introduced—for example, Upper Austria launched a programme co-financing the preparation of community energy projects, which was later adopted at the national level. Overall, Austria demonstrates strong political commitment to the development of energy communities, resulting in hundreds of established communities across the country

2.1.2 CESP as a privately operated entity (Netherlands)

Energie Samen is a specific umbrella organisation that built a strong local presence that enabled a high-quality feedback loop to policymakers that were part of communities. This allowed for organisation to pool key policy, energy and technical experts. Energie Samen is central for R&D in the Netherlands and cross-border collaboration that allows further enhancement and building of the CESP system. It managed to "professionalise" an internal and external pool of experts that can match big energy stakeholders and barter for smaller communities and create a "bike lane" conditions for small organisations to work in the energy sector. Further analysis is provided in Table 2.

Table 2. Netherlands: a community led CESP [8, 9]

Challenges and focus of CESP:	The Netherlands has one of the most developed energy community landscapes in Europe, with nearly 700 energy cooperatives involving more than 110,000 members. However, despite their scale and number, regulatory and practical barriers continue to hinder their operation. The focus of the Dutch CESP model is on citizen empowerment and knowledge provision. Through widely accessible information, networking, and advocacy, the aim is to ensure that every citizen can easily participate in the energy transition within their local context. The key challenges addressed include the lack of fully tailored legal solutions for energy communities—pending the adoption of a new Energy Law that will fully align national legislation with EU definitions—and the growing need to professionalise an increasing number of local initiatives.
How is it structured	Support for energy communities in the Netherlands is predominantly bottom-up, led by civil society actors with the government playing a partnering role. A central position is held by Energie Samen, the national federation of energy communities (cooperatives), which brings together more than 200 local organisations.

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	Energie Samen functions as both a service centre, funding dispatcher/moderator and an advocacy body. It supports newly established groups with advice and tools and lobbies public authorities for improved framework conditions. A second key pillar is the "HIER Opgewekt" platform, operated by the non-profit HIER Climate Foundation. HIER Opgewekt acts as a knowledge hub, collecting and disseminating information on energy communities, organising annual conferences, and publishing the Local Energy Monitor (an annual report tracking the progress of the movement). Unlike Austria, the Netherlands does not have a dedicated state-run coordination office for energy communities. Instead, the Ministry of Economic Affairs and Climate Policy cooperates with a network of organisations—for example, by financially supporting the HIER platform through "Green Deal" initiatives between 2015 and 2018 and by involving Energie Samen as a partner in policy development. In addition, many municipalities and provinces operate local energy desks or advisory services that support citizen initiatives (for example, Friesland and North Brabant finance networks of energy coaches and development funds for local projects).
Services provided	Information and education services are highly developed. Professional support is available through the Energie Samen federation, which offers its members advice on financing, legal issues, and technical studies (for example, assisting new cooperatives with wind feasibility studies and permitting processes). Energie Samen also coordinates joint projects (such as collective equipment procurement and the development of energy-sharing platforms) and provides collective representation by negotiating on behalf of communities with government and sector stakeholders (e.g. on tariffs and grid access). Most Dutch energy communities focus on renewable electricity generation—there are hundreds of solar PV projects—but an increasing number are also entering the heat sector (such as neighbourhood heating networks), driven by national plans to phase out natural gas. Networking services are also strong, supported by an informal peer-to-peer culture: more experienced cooperatives (such as Windvogel or Deltawind) share knowledge with newer initiatives, a practice institutionalised through Energie Samen working groups.
Supporting environment	Although a single, comprehensive legal definition has long been absent, the Netherlands has gradually developed a supportive—albeit partly fragmented—framework for energy communities. Since the late 1980s, experimental provisions have enabled early local wind cooperatives to access the grid and benefit from guaranteed purchase prices. In 2013, the national Energy Agreement introduced the "postcoderoos" scheme—a tax incentive for members of collective projects within the same postal code area—which stimulated the creation of many solar cooperatives. In 2021, this scheme evolved into the SCE subsidy programme for cooperative energy generation, providing multi-year feed-in support and improving the financial viability of community projects. The regulatory framework is currently in transition: a new Energy Law, intended to replace the existing Electricity Act, is under legislative procedure and foresees the integration of REC and CEC definitions in line with EU directives. To date, most energy communities have been registered as associations or cooperatives, which has meant they were legally treated as private companies, with certain limitations in the energy market. The new law is expected to remove these constraints and enable energy sharing within communities with fewer administrative and financial burdens. Overall, the enabling environment

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	is further strengthened by national funding schemes (e.g. renewable energy incentives open to cooperatives), a stakeholder ecosystem that includes financial institutions willing to lend to cooperatives, and high public awareness of climate change, which facilitates citizen engagement in energy communities.

2.1.3 Hybrid approach to CESP model (Slovenia)

Slovenia experienced a strong momentum in the development of energy communities, which slowed significantly after the transition from annual net metering to 15-minute energy production/consumption calculation, rendering many projects less financially viable. During this period, several organisations began developing service-point functions: Borzen (Slovenian Electricity Market Operator) emerged as a national contact point and funding enabler; organisations such as Focus and Korimako developed as specialised service providers supporting project enhancement; and regional energy agencies assumed the role of mid-level service providers. Short period of financially sustainable energy communities produced roughly 476 energy sharing or energy communities' schemes.

Many energy community initiatives in Slovenia resemble those in other Eastern EU countries participating in the COMET project. They are predominantly based on public rooftops or driven by public bodies interested in initiating energy community projects for a variety of reasons, including energy sharing, better utilisation of rooftops that remain underused during summer months, citizen engagement, local economic development, and supporting local companies in mitigating rising energy prices. Further analysis is provided in Table 3.

Table 3. Slovenia a hybrid CESP market [10]

Challenges and focus of CESP:	Energy communities in Slovenia are currently at a very early stage of development. They face an inadequate regulatory framework, underdeveloped business models, and very low public awareness of the concept. The Slovenian CESP model is therefore still emerging aiming to raise awareness and remove basic barriers to initiate pilot community projects. In other words, the primary challenge being addressed is general lack of information and trust, tackled through citizen education on the benefits of energy communities, alongside continuous pressure to further specify and operationalise the regulatory framework.
How is it structured:	Unlike Austria, Slovenia is yet to build centralized and auxiliary service providers for energy communities. A partial service-point role is currently performed by the market operator Borzen through its Renewable Energy Information Centre, which serves as a national contact point providing information to renewable energy investors and aims to accelerate project development—thereby indirectly supporting energy communities as well. In addition, Slovenia relies heavily on civil society initiatives and EU-funded projects. Within the LIFE COMET project, a stakeholder coalition has been established to promote energy communities, bringing together energy agencies, non-governmental organisations (such as Focus), and local initiatives. This coalition effectively functions as an embryonic national CESP, coordinating knowledge exchange, identifying systemic gaps, and advocating for improved conditions for energy communities.

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Services provided:	At present, Slovenia offers a limited range of formal services for energy community initiatives. Information provision is the dominant service: Borzen's portal delivers general renewable energy information and procedural guidance for investors, while NGOs and EU projects organise workshops and public awareness campaigns for citizens. Technical support is gradually developing through EU-funded initiatives; for example, the COMET project has introduced a tool to assess the "maturity" of the national environment for energy communities and has developed an action plan to improve conditions in Slovenia. However, many services remain informal and depend on motivated individuals and volunteer experts who support communities with legal guidance, founding documents, and peer advice.
Supporting environment:	In 2021, the Slovenian government transposed the basic definitions of Renewable Energy Communities (RECs) and Citizen Energy Communities (CECs) into national legislation. This created a formal foundation allowing citizens to establish communities and participate in energy markets, but key secondary legislation and incentive schemes were delayed. Implementation rules for collective self-consumption were adopted only in 2022, while the so-called "Community Enabling Programme" foreseen by law has not yet become operational. As a result, the legal framework has remained insufficiently detailed to allow energy communities to scale easily, which is reflected in the fact that business models have so far been largely limited to virtual net-metering schemes, which have since been discontinued. On the positive side, some barriers have been removed: distribution system operators are now obliged to register energy communities free of charge and to manage collective consumption settlement for their members. In addition, EU funding has been secured to stimulate projects (e.g. €11.9 million allocated for renewable self-consumption projects in the period 2025–2027). Nevertheless, significant progress will require stronger political commitment and the implementation of concrete support programmes to address the very low levels of public awareness and trust in energy communities.

2.2 EU-level initiatives supporting energy communities

Several EU-funded initiatives have played a crucial role in structuring, scaling and professionalising support to energy communities at the European level. While they differ in mandate and instruments, they collectively function as **EU-level Community Energy Service Points (CESPs)**, providing strategic guidance, capacity building, and replication support across Member States. The most relevant initiatives for development of CESPs within EU funded programmes include the **Clean Energy for EU Islands Secretariat (CE4EUI secretariat)**, the **Energy Communities Repository**, and thematic EU projects such as **DECIDE** and **ShaES**.

Clean Energy for EU Islands Secretariat (CE4EUI secretariat)

CE4EUI secretariat was established to accelerate the clean energy transition of EU islands by addressing structural barriers faced by local communities: limited administrative capacity, fragmented expertise, and weak access to finance. Its support model combined **centralised coordination at the EU level** with **tailored assistance at local level**. CE4EUI secretariat provided [12]:

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- strategic guidance for islands to develop Clean Energy Transition Agendas,
- matchmaking between islands, experts, financiers and technology providers,
- capacity-building programmes for local authorities and community actors,
- visibility and political backing at the EU level.

Crucially, CE4EUI secretariat did not implement projects itself. Instead, it acted as an **enabler and orchestrator**, reducing complexity and transaction costs for local actors while strengthening their ability to lead projects autonomously.

Energy Communities Repository

The Energy Communities Repository was designed as a **horizontal support infrastructure** for emerging and existing energy communities across Europe [11]. Its core rationale was to overcome fragmentation of knowledge and uneven access to expertise between countries. Support was delivered through:

- curated case studies and good practice examples,
- practical guidance on legal, organisational and financial models,
- peer-learning formats and thematic exchanges,
- synthesis of lessons learned into reusable resources.

The Repository functioned less as a helpdesk and more as a **knowledge backbone** for national and regional CESPs, enabling replication without reinventing solutions in each country.

DECIDE and SHARES projects

Projects such as DECIDE and ShaRES provided **deep, thematic support** focusing on specific barriers: citizen engagement and governance (DECIDE), and technical, regulatory and market conditions for energy sharing (ShaRES). Their contribution lies in [13]:

- piloting innovative engagement and decision-making models,
- translating complex regulatory frameworks into operational guidance,
- generating evidence on what works (and what does not) in real-life settings.

These projects demonstrate how **targeted experimentation**, when properly documented, can inform broader service models for CESPs.

2.3 Building blocks of CESP

Based on a comparative analysis of established existing service delivery models and emerging EU best practices, the following building blocks form the core architecture of a functional and scalable CESP system. These components can be standardised or harmonised at national level; while allowing flexibility for local adaptation. Minding that only ideal CESP could provide more than half of these blocks on a national level due to diversity of expertise and high level of coordination need to run different operations, and some of it inherently being outsourced within CESP ecosystem.

1. **Online solution; point of contact**
   The analysed examples show there is a need for harmonised centralised solution that has up-to-date and trustworthy information on energy community models, legal and technical steps, and available financing options.

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Ideally the solution can include real project examples, downloadable templates such as statutes and contracts, checklists, and basic simulation tools for assessing technical and economic feasibility. To support visibility and engagement, it should feature active communities and a public project registry (if existing). Digital onboarding (e.g. via pre-audit forms), simplified offers and direct contact channels (chat, phone, email) should be integrated into the platform to guide users from idea to action.

2. **Legal and administrative support**

   This block ensures users receive structured guidance in forming legal entities (e.g. cooperatives, associations) through standardised templates and accessible FAQs. A helpdesk via phone or email should direct users to professionals. Ideally to collect standardised contract templates for collective self-consumption, multi-apartment building governance and prosumer onboarding to complete the legal toolkit.

3. **Technical and financial support**

   An effective CESP provides users with modularised packages tailored to different user profiles such as apartment buildings, rural communities or individual prosumers. These packages should be supported by feasibility calculators or experts with access to programs or calculations adapted to local tariff structures, grid fees and national subsidy schemes. Ideally, users should receive a concise offer that includes indicative cost, timeline and matching financing sources. Wherever possible, offers should be connected to pre-approved or supported development funds for early-stage costs. The outcome is a visual, user-friendly offer sheet, developed under the guidance of a dedicated case manager.

4. **Operational implementation support**

   In this phase, case managers coordinate legal, technical and financial workflows, ensuring facilitation and simplification of process execution for end users. The CESP should be integrated with a network of verified contractors responsible for design, installation and long-term maintenance. Ideally, the users are supported step-by-step through contracting, funding applications and construction. Progress is tracked digitally using a CRM system or other systems (complex sheets/Excel files) that record milestones, documentation and stakeholder communication.

5. **Expert networks and peer support**

   The CESP should maintain a directory of certified experts including engineers, legal advisors, communicators and project managers. These experts are usually available on demand to communities at affordable or subsidised rates. The model should also promote structured peer-to-peer exchanges, mentorship between advanced and new communities, and targeted deployment of technical advisors to underserved areas. Linkages to national community energy forums and open-source knowledge hubs strengthen this ecosystem.

6. **Training and capacity building**

   A CESP provides targeted capacity-building activities, primarily through practical workshops and webinars for community leaders, volunteers and partner organisations. These activities focus on essential topics such as community governance, basic legal requirements, project development steps, stakeholder coordination and financing options.

7. **Awareness and outreach**

   The CESP runs integrated communication campaigns adapted to its target audiences such as homeowners, tenants, municipalities and SMEs. Effective campaigns use real-world stories and testimonials, supported by action-based storytelling methods that appeal to user emotions and motivations. Channels should include a mix of billboards, social media, radio and community events. Visibility can be amplified through national days of action, milestone storytelling and alignment with public policy cycles or funding opportunities.

8. **Service provider registry**

   Internally CESP should maintain a registry of vetted service providers, covering domains such as technical design, billing, engineering, legal support, ICT platforms and project management. Ideally, the registry is searchable by

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region, service type and certification, with optional quality assurance mechanisms or labelling schemes to support trust and transparency.

9. **Monitoring, learning and scaling**
   The CESP might include a robust monitoring framework with indicators such as conversion rate, satisfaction levels, process duration and social or technical impact. After project completion, it could offer continued user support for maintenance, optimisation or troubleshooting. It is advised that good practices and success stories should be documented and disseminated across regions. A learning-by-doing approach, combined with participation in EU-level knowledge sharing platforms, ensures continuous system improvement and replicability.

Establishment of CESP is a challenging undertaking, especially in the countries that are challenged by low uptake market conditions (such as of SE Europe countries) that include: low prices of energy that don't allow for sustainable business models (if projects aren't rentable then only piloting occurs in municipalities and SMES, where citizens don't see their role) or national framework that doesn't plan or deliver supporting structures (financial, administrative nor technical) creating no edge for fragile ideas and citizen groups. The below provided Table 4 describes different market conditions coupled with CESP development characteristics and potential market roles identified through Life COMET project activities.

Table 4. CESP developing over market conditions and time

Development phase	CESP development characteristics	Role of CESP
Phase 1. **Pre-enabling market**	Informational campaigns, community mobilisation, initial capacity building. OSS/Service Points are absent or informal. Public discourse just forming.	Primarily awareness-raising and informal support; no structured case management.
Phase 2. **Early pilots (EU-funded)**	Isolated pilot initiatives launched via EU funding. Peer-to-peer learning prominent. Frameworks unclear, local innovation compensates for lack of formal support.	Testing legal/technical advisory services; decentralised, case-by-case peer support.
Phase 3. **Pre-market structuring**	Concept-to-operation services piloted by public entities. First replicable models. OSS functions beginning to appear within institutional settings.	Partial OSS functions (legal templates, light project support); coordination remains limited.
Phase 4. **Structured services emerging**	Institutional or national OSS established; first private providers appear. Core services like legal, technical, and financial support standardised in select regions.	Operational OSS (CRM, workflows, contracting) established in core areas.

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Phase 5. **Full market maturity**	Competitive service landscape led by private and hybrid providers. OSS ecosystem is scalable, user-friendly, financially sustainable and fully integrated with policy instruments.	Fully digital and analogue OSS system in place, replicable nationally, with dedicated funding streams and strong case manager capacity.

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3. Practical structure of CESPs

Community Energy Service Points (CESPs) are structured as intermediary service hubs that organise support for community energy initiatives through clearly defined roles, processes and decision rules. Their purpose is to transform dispersed interest and early-stage ideas into structured, realistic and, where possible, bankable initiatives by combining information, advisory support and controlled access to expert resources. CESPs are designed to function as **filters and coordinators**, accepting a wide range of energy-related initiatives while applying systematic screening to prioritise those with sufficient readiness, leadership and implementation potential.

CESP does: CESPs provide information, education and first-line guidance, offer advisory support, connect initiatives with relevant legal, technical and financial partners, and generate structured feedback for public institutions and policy processes. They may support the preparation of documentation and early mobilisation activities, but they do not replace community ownership, act as project developers, or assume responsibility for project implementation. CESPs operate through frontstage services for user interaction and backstage processes for coordination, quality control and expert engagement.

CESP doesn't: CESPs do not respond to all inquiries indiscriminately, do not collect data on behalf of users, do not negotiate with DSOs or financial institutions instead of communities, and do not initiate projects without committed local leadership. Through this structured role, CESPs reduce system overload, improve project quality and contribute to the gradual maturation of community energy markets.

But market conditions do change: CESPs are designed with a high degree of flexibility, allowing their role and set of services to adapt to evolving market conditions and enabling responsiveness to national and regional contexts.

3.1 Organisational layers of CESPs

The organisational structure of a CESP is designed to balance strategic legitimacy, operational delivery and flexible access to expertise under conditions of limited market maturity. Drawing on Mintzberg's organisational model [3], CESPs separate strategic direction, coordination, service delivery and expert support to avoid overload, ensure clarity of roles and enable gradual scaling. This is a structure for mature markets, while allowing CESPs in emerging contexts to operate with minimal core staff and outsourced capacities that evolve internally over time.

This chapter will analyse organisation layers of CESP:

- **Strategic apex:** has mandate, political backing, partnership relations.
- **Coordination layer:** establishes decision-making rules, and acts as an architect of services and procedures.
- **Operating core:** hands on operatives or case managers, advisors and supporting staff.
- **Expert pool:** legal, financial, technical and communication experts; usually outsourced in specific cases.
- **Support staff:** communications, administration, IT systems, CRM or monitoring.

3.1.1 Strategic apex

In real-life organisations such as development agencies, cooperative federations or public OSS units, the strategic apex corresponds to the body that provides mandate, legitimacy and long-term direction, without engaging in daily operations. In a CESP, this layer is responsible for setting strategic priorities, responding to market and policy risks, and positioning the CESP within the broader energy transition ecosystem. The strategic apex defines what the CESP focuses on, what it deliberately does not take on, and how it evolves as the market matures. It ensures alignment

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with public policy objectives, funding frameworks and partnership expectations. This layer is critical for protecting the CESP from mission drift and operational overload, especially in early-stage markets.

Formalisation of the strategic apex typically takes the form of a steering group, management board or equivalent governance body, supported by written mandates and partnership agreements. Meetings are usually held on a monthly or quarterly basis, depending on market dynamics and workload.

In low-capacity contexts, the strategic apex function may be fulfilled by a small leadership group or even a single senior role within a host organisation. While roles may overlap with coordination functions, strategic decision-making responsibilities should remain clearly distinguished and explicitly acknowledged.

The strategic apex interacts primarily with the coordination layer, receiving structured feedback on operational performance and emerging risks, and providing guidance on strategic adjustments, partnerships and resource allocation. In following text and Table 5 there are typical operative directions for CESP leaders.

Typical activities and frequency:

- Validation of service scope, prioritisation logic and risk appetite (annually)
- Quarterly strategic review (priorities, risks, market signals)
- Review of CESP performance summaries (quarterly)
- Approval of partnership agreements and strategic escalations (ad hoc)

Monitoring focus:

- Strategic risks (policy shifts, funding gaps, reputational exposure)
- Alignment with mandate and objectives
- Sustainability trajectory of the CESP, defining guiding principles and challenge diagnosis

Guiding questions (for setup and operation):

- Are we still doing the right things and not doing the wrong ones?
- Which risks should *not* be accepted at the operational level?
- Is the coordination layer empowered enough to decide without escalation?
- Do partnerships strengthen or dilute our mandate?

Table 5. Tools for strategic apex

Tool	Purpose
Strategic briefs	Short documents for decision-making and alignment
Quarterly performance & risk report	Overview of results, risks and sustainability
Partnership decision memo	Assessment of strategic partnerships
Policy & market intelligence notes	Summarised external signals
Organisational strategy document	Defines long-term positioning and mandate

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3.1.2 Coordination layer

In practice, this layer resembles the role played by programme managers (middle management) or product leads in service-oriented organisations. It represents the operational intelligence of the CESP and is the most critical layer for day-to-day functioning. The coordination layer translates strategic direction into operational priorities, manages intake logic and triage rules, and ensures consistency across services and cases. It oversees case allocation, prioritisation and escalation, and plays a central role in risk management and quality control.

In emerging markets with limited staff, this role is often combined with operational or advisory functions (less desirable). Team members may carry multiple responsibilities, acting simultaneously as coordinators, senior advisors and internal mentors. Explicit recognition of these overlapping roles is essential to avoid decision bottlenecks and burnout.

Formalisation is achieved through documented decision rules, internal procedures and clear role descriptions, even when roles are combined. This layer typically meets frequently, often weekly, to review cases, risks and service performance. The coordination layer interacts intensively with the operating core, expert pool and support staff, and serves as the primary interface between operations and the strategic apex. In following text and Table 6 there are typical operative directions for CESP leaders.

Typical activities and frequency

- Triage and prioritisation meetings (weekly)
- Service performance and capacity review (monthly)
- Continuous case monitoring and reassignment (ongoing)
- Identification and escalation of systemic risks (ongoing)

Monitoring focus

- Case flow and bottlenecks
- Capacity vs. demand balance
- Quality and consistency of service delivery
- Early warning signals from operating core

Guiding questions

- Are we spending time on the *right* cases?
- Where are decision bottlenecks forming?
- Which rules no longer work in practice?
- What should be escalated now vs. absorbed operationally?

Table 6. Tools for coordination layer

Tool	Purpose
Intake & prioritisation dashboard	Overview of demand and case flow
Case prioritisation matrix	Ranks cases based on agreed criteria
Weekly coordination agenda & notes	Structures regular governance meetings
Capacity planning sheet	Matches demand with team availability
Risk & escalation register	Tracks operational risks
Service rules & logic document	Defines how services are applied

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3.1.3 Operating core

The operating core corresponds to frontline service delivery units commonly found in energy agencies, advisory services or customer success teams. In a CESP, this layer is responsible for direct interaction with users and delivery of services across informing, advisory and acceleration phases. Operating core staff guide initiatives through defined processes, support the preparation of documentation, and help users navigate regulatory, technical and financial requirements. Through continuous interaction with users, this layer generates critical insights into practical barriers, recurring issues and opportunities for service improvement.

In minimal viable setups, operating core roles are often combined with coordination or support functions. Staff may act as case managers while also contributing to outreach, data collection or basic technical assessments. Clear process descriptions and templates are therefore essential. Formalisation relies on standard operating procedures, service templates and clearly defined service-level expectations. The operating core interacts primarily with the coordination layer and expert pool, feeding real-life experience back into service design and strategic decisions. In following text and Table 7 there are typical operative directions for CESP leaders.

Typical activities and frequency

- Adjusting service procedures and templates (2x a year)
- Ongoing identification of risks and user friction points (monthly)
- Regular feedback to coordination layer (weekly or bi-weekly)
- User interaction and case handling (daily)

Monitoring focus

- User progress and drop-off points
- Practical feasibility of service procedures
- Repeated user questions or misunderstandings
- Early signs of conflict or misalignment within initiatives

Guiding questions

- Where do users get stuck most often?
- Which steps create confusion or resistance?
- Are escalation thresholds clear and respected?
- What should be simplified or removed from the process?

Table 7. Tools for operating core

Tool	Purpose
Case files	Standardised documentation per user
Service process diagrams	Visual step-by-step service flows
User checklists	Clarifies user responsibilities
Onboarding materials	Introduces users to the process
Feedback capture forms	Collects user feedback
Escalation triggers	Defines when to escalate issues

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3.1.4 Expert pool

The expert pool mirrors the use of external specialists in consultancy frameworks or public-private partnerships. It provides access to legal, financial, technical and communication expertise without requiring permanent internal staffing. Experts are activated on demand through clear protocols and standard briefs, ensuring efficiency and consistency. In some contexts, expert capacity may exist internally; however, maintaining a flexible pool remains preferable to over-specialisation in early stages.

Formalisation typically takes place through framework contracts, partnership agreements or coalition arrangements. The expert pool interacts mainly with the operating core and coordination layer and should not operate independently from CESP decision rules. In following text and Table 8 and 9 there are typical operative directions for CESP leaders.

Typical activities and frequency

- Updating expert briefs and protocols (periodic)
- Delivery of scoped expert inputs (periodic)
- Occasional review of expert performance and relevance (monthly)
- On-demand expert activation per case (weekly)

Monitoring focus

- Timeliness and quality of expert inputs
- Fit between expert advice and CESP decision rules
- Cost–benefit of expert engagement

Guiding questions

- Are experts solving problems or creating new ones?
- Is expert input aligned with CESP service logic?
- Which expertise is repeatedly needed and may justify internalisation?
- Are decision boundaries between experts and CESP clear?

Table 8. Tools for expert pool

Tool	Purpose
Expert brief template	Defines scope and expectations
Standard ToR / scope of work	Formalises expert engagement
Expert review checklist	Validates expert outputs
Performance notes	Assesses expert contribution
Knowledge capture template	Documents lessons from expert input
Forms, manuals, model contacts, guidelines	Standardised documentation

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Table 9. General tools used across all CESP layers

Tool	Purpose
Shared document repository	Central storage for strategies, procedures, templates and cases
Decision log	Records key decisions, rationale and responsibilities
CRM / case tracking system	Tracks inquiries, cases, status and outcomes
Intake & triage form	Standardised entry point for all requests
Service catalogue	Defines what services CESP offers and does not offer
Escalation protocol	Defines when and how cases are escalated
Lessons learned template	Captures operational insights for improvement
Standard comms tools	E-mail, communication apps (WhatsApp, Viber…) and hotline, videoconference apps (Zoom, G-meet…), newsletter, social & digital content (posts, videos, blogs, etc.), website.
Advance comms tools	CRM, Slack/Teams, digital forms, digital boards

3.2 Key structural and practical elements to initiate CESP

To establish a functional and sustainable CESP, the CESP leader must recognise that supporting energy community projects is a **structural and organisational challenge**, not a single, simple intervention. The following sections outline key structural strategies and practical elements that newly established CESPs can apply to organise their services and operate effectively.

3.2.1 CESP Internal capacity building

Internal capacity building ensures that CESPs deliver high-quality services and adapt to evolving market conditions. The main goals are:

- Equipping staff with the skills to manage complex cases and support diverse stakeholders.
- Building redundancy by cross-training staff across functions to maintain service continuity.
- Maintaining a living knowledge base and institutional memory.

Skills and training needs

For a mature CESP, training should cover:

1. **Technical and regulatory literacy**: understanding renewable energy technologies, grid requirements, and changes in legislation.
2. **Financial literacy**: basic financial modelling, funding instruments, and economic feasibility analyses.
3. **Facilitation and communication skills for sales**: engaging diverse groups, conflict management, and clear communication of complex concepts.
4. **Service design and process optimisation**: using service blueprinting, user journey mapping and continuous improvement techniques to refine services.
5. **Data and digital skills**: CRM use, data protection, and analytical skills for KPI reporting.

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Cross-training and internal mobility

Because small teams in CESP often juggle multiple roles, cross-training is essential. Examples include:

- Case managers spending time in the support team to understand data processes.
- Technical experts shadowing case managers to learn about user engagement.
- Coordination staff participating in marketing activities to align messaging with service capacity.

Cross-training fosters a shared understanding of organisational goals, reduces reliance on key individuals and prepares staff for career progression.

Knowledge base and peer learning

A knowledge base is only effective if it is updated and used. Processes to sustain it include:

- Assigning responsibility for content curation and updates (e.g., the quality lead in the coordination layer).
- Encouraging staff to write "micro-case studies" after completing complex cases, capturing challenges, solutions and lessons learned.
- Organising periodic peer learning sessions (e.g., lunch-and-learn events) where staff share experiences and discuss difficult cases.

3.2.2 CESP Online roll-out

A robust online infrastructure ensures scalability and consistent service delivery by:

- Providing a seamless user experience from first contact to follow-up.
- Tracking user journeys and capturing data for monitoring and reporting.
- Centralising knowledge and documentation to support advisors and case managers.
- Ensuring compliance with data protection regulations (GDPR and national laws).

Website and user portal

The website should serve as the primary entry point. Core features include:

- **Clear navigation** with sections on "Start a project", "How we help", and "Contact us".
- **Intake forms** with conditional logic to gather information on the initiative's type, readiness level and expected support needs. The form can enforce different mandatory fields and provide tooltips to help users supply complete and accurate information.
- **Knowledge base** with guides, FAQs, templates and case studies. This repository should be searchable and tagged by topic and readiness level.
- **Appointment scheduling** integrated with the CESP's calendar to manage introductory calls.
- **Accessibility features**, ensuring compliance with web content accessibility standards (WCAG) for inclusivity.

CRM and case management system

A CRM system is vital for managing intake, triage and follow-up. The system should:

- Store user data securely and link it to cases, including notes, documents and communications.
- Support triage workflows, with rules triggering automatic assignment to case managers or follow-ups.
- Enable reporting on KPIs: number of inquiries, case status, resolution times, and conversion rates.
- Integrate with marketing tools (newsletters, forms) and help produce quarterly performance reports.

For small teams, a cloud-based CRM with out-of-the-box features may suffice. As demand grows, custom fields and automation can be added.

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Knowledge base and document management

Internal documentation (checklists, templates, legal summaries) must be centralised to ensure consistent advice across case managers. A knowledge base can be hosted on a wiki or as part of the CRM. Features include version control, tagging and user feedback on the relevance of documents. Content should cover legal frameworks, technical guidelines, financial models and project management tools. Each document must specify its applicability (e.g., "valid for projects under 1 MW" or "applicable to cooperatives only").

3.2.3 Partnership and ecosystem development

Partnerships enable CESPs to leverage external expertise, ensure project viability and extend their reach by:

- Building a reliable network of technical, financial and administrative partners.
- Formalising collaboration agreements to define roles, responsibilities and liabilities.
- Ensuring that partnerships align with the CESP's mission and do not compromise neutrality.

Identifying partners

Potential partners include:

1. **DSOs and grid operators:** critical for grid connection assessments and technical approvals.
2. **Local authorities and public institutions:** owners of potential project sites and facilitators of community initiatives.
3. **Financial institutions:** banks, cooperative lenders, municipal funds, and grant programmes.
4. **Installers and contractors:** to implement projects once initiatives are ready.
5. **Professional associations and NGOs:** to provide outreach channels, capacity building and advocacy.

Identification should prioritise reliability, alignment of values, and demonstrated expertise. The coordination layer should maintain a partner registry capturing the scope and performance of each partner.

For example, contractual arrangements should define:

- Contracts and memoranda of understanding (MoUs) must specify:
- Scope of collaboration and services to be provided.
- Roles and responsibilities of both CESP and the partner.
- Service-level expectations and dispute resolution mechanisms.
- Confidentiality and data protection clauses.
- Financial terms (if any) and cost recovery mechanisms.

For small CESPs, template agreements reduce administrative burden. As the CESP grows, more tailored contracts may be needed.

Cooperation mechanisms

Effective cooperation requires clear processes:

- **Referral processes:** how initiatives are introduced to partners (e.g., standardised referral forms and briefing notes).
- **Communication protocols:** designated contact points, agreed response times and channels.
- **Performance monitoring:** regular feedback from case managers and partners to assess collaboration quality.
- **Joint activities:** co-hosting events, joint training sessions, or shared communication campaigns.

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3.2.4 Marketing and communication strategy

A marketing and communication strategy provides structure for engaging target audiences, positioning the CESP brand, and managing expectations.

It should:

- Raise awareness about the CESP's existence, mission and services.
- Attract high-quality leads (initiatives, municipalities, cooperatives, citizen groups) and filter out irrelevant inquiries.
- Build trust with stakeholders (DSOs, local authorities, banks, policy makers).
- Provide feedback to policy actors, aligning community needs with public programmes.

Target audiences and segmentation

For mature CESPs the primary audiences are:

1. **Citizen initiatives** seeking technical and organisational support.
2. **Local authorities and public building owners** interested in renewable energy projects or energy efficiency.
3. **Private developers and SMEs** that can partner with citizen initiatives.
4. **Financial institutions** offering loans, guarantees or grants.

Segment audiences by readiness level and tailor messages accordingly. For example, a community with a clear project plan will respond better to detailed guidance on legal forms, while an early-stage group may need simple, inspirational information.

Channels and activities

A mature CESP uses a mix of channels:

- **Digital:** A user-friendly website with clear service descriptions, intake forms and FAQs; social media channels for broad outreach; webinars and online Q&A sessions; newsletters segmented by audience.
- **Offline:** Workshops, roadshows, local energy fairs; targeted meetings with local authorities; participation in national conferences and sector events.
- **Partnership communication:** Joint press releases, co-branded events with DSOs or municipal associations, cross-promotion with national energy agencies.

Each campaign should include clear calls to action (e.g., "Register your initiative here", "Download the starter guide") and integrate automatic follow-ups (e-mail sequences) to nurture leads.

Key messages and brand positioning

The CESP brand should convey: **trust**, **competence**, **accessibility** and **independence**. Messaging must emphasise that the CESP is not a commercial developer or installer but a facilitator that provides impartial guidance and connects stakeholders.

Example messages:

"Your partner for creating local energy projects — from idea to implementation."; "We help communities navigate legal, technical and financial complexities.";"Together we build sustainable energy solutions that benefit citizens and the climate."

Marketing tools and metrics:

- A **content calendar** linking campaigns to national funding rounds and policy deadlines.
- Use of **customer relationship management (CRM) software** to track inquiries, segment audiences and automate communication.

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- **Performance metrics**: number of high-quality inquiries, conversion rate from interest to advisory, engagement rates on digital channels, satisfaction surveys.
- **Feedback loops**: surveys and interviews with users to refine messaging and adjust the strategy.

Cross strategy reflection questions for implementation

At the end of each sub-section, coordinators should ask themselves:

1. **Marketing & Communication:** Are our campaigns attracting the right types of initiatives? Which channels generate the most qualified leads? Does our messaging align with the services we can realistically provide?
2. **Digital Roll-out:** Is our digital portal intuitive and accessible? Are intake forms capturing all information needed for triage? Are we using CRM data effectively to improve services?
3. **Internal Capacity Building:** Do we have the right balance of skills in our team? Are cross-trained staff able to step into critical roles when needed? How often do we update our knowledge base and materials?
4. **Partnership Development:** Do our partners complement our capabilities or create dependency? Are our contracts clear on roles, responsibilities and data sharing? How do we handle performance issues with partners?

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4. Delivery of CESP system of services

4.1 Service operative logic

This section describes the operational service logic of a Community Energy Service Point (CESP). While the previous sections focus on organisational structure, mandates and governance, this chapter explains how services are delivered in practice—from first contact with users to post-implementation follow-up. The service logic presented below functions as a backbone for all CESP services, ensuring consistency, transparency and scalability across different national contexts.

The service logic consists of five interconnected building blocks:

- Entry to the service: intake, triage and qualification
- Decision making and service packaging
- Operational implementation and coordination
- Monitoring, follow-up and learning
- Tools and support systems

4.1.1 Entry to the service: intake, triage and qualification

The entry point is the most critical component of the CESP operational logic. Its primary function is to transform diffuse interest into structured cases that can be assessed, prioritised and supported. Without a clear intake and qualification process, CESPs risk becoming overwhelmed by unstructured requests and low-readiness initiatives.

CESPs typically provide multiple access channels:

- digital intake forms or questionnaires (“pre-audit” tools),
- direct contact via phone or e-mail,
- physical or online consultations with a first-line advisor.

Regardless of the channel, all inquiries are funnelled into a single intake system. At this stage, the role of the CESP is not to provide full consultancy, but to **understand the nature of the request** and determine whether further support is justified.

A **case manager** or first-contact advisor performs an initial triage based on a limited set of criteria such as:

- type of applicant (citizen group, cooperative, municipality, informal initiative),
- maturity level of the idea or project,
- technical and spatial feasibility (very high-level),
- indicative financial capacity or access to funding,
- alignment with CESP mandate and available resources.

This qualification step allows CESPs to distinguish between:

- general information requests,
- early-stage initiatives requiring orientation,
- advanced initiatives eligible for deeper technical assistance.

4.1.2 Decision making and service packaging

Once a case is qualified, the CESP moves to the **decision and service packaging phase**. This phase translates user needs into a **clear support pathway**, reducing uncertainty for both the user and the service provider.

Rather than designing bespoke support from scratch, CESPs rely on **standardised service packages** aligned with typical user profiles and development stages. These packages may differ by country, but generally cover:

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- information and orientation support,
- engagement with EC or ES members/partners,
- organisational and legal setup,
- project development and financing preparation,
- implementation and coordination support.

4.1.3 Operational implementation and coordination

The **implementation phase** begins once the service package is agreed. Here, the CESP shifts from advisory orientation to **active coordination and support**, while still avoiding direct assumption of investment or delivery risks.

Operational implementation typically includes:

- legal and organisational guidance (choice of legal form, statutes, internal rules),
- technical pre-feasibility and project structuring,
- support in identifying and engaging qualified service providers,
- facilitation of access to financing instruments or public support schemes.

The CESP acts as a **trusted intermediary**, coordinating inputs from different actors rather than replacing them. Legal, technical and financial expertise is often provided through:

- external experts contracted by the CESP,
- coalition members or partner organisations,
- publicly available support mechanisms.

Throughout implementation, the case manager remains the **single point of contact** for the user, ensuring continuity and coherence. This role is critical for:

- tracking progress against agreed milestones,
- resolving coordination issues between actors,
- ensuring that the project remains aligned with its original objectives.

Formal agreements or contracts may be used to define responsibilities, particularly when third-party experts are involved. However, the CESP does not take on the role of project owner or contractor, preserving its neutrality and long-term credibility.

4.1.4 Monitoring, follow-up and learning

CESP services do not end with project implementation. A core part of the operational logic is **monitoring and follow-up**, which serves both accountability and learning purposes.

Monitoring focuses on a limited set of **key performance indicators**, such as:

- conversion rates from inquiry to supported project,
- time required to move from intake to decision,
- duration of advisory or coordination support,
- user satisfaction and perceived usefulness,
- tangible outputs (projects initiated, capacity installed, investments triggered).

These indicators are not intended as rigid performance metrics, but as **management tools** that help CESPs understand where processes work well and where bottlenecks occur.

Post-implementation follow-up may include:

- light-touch user support for optimisation or troubleshooting,
- documentation of lessons learned,
- identification of recurring regulatory or market barriers.

This feedback is systematically captured and fed back into:

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- internal process improvements,
- updates of templates and guidance materials,
- policy dialogue and advocacy activities at national level.

4.1.5 Tools and support systems

Underlying all service delivery activities is a set of **support and governance systems** that enable consistency, scalability and transparency.

At operational level, CESPs typically rely on:

- a basic CRM or case-tracking system,
- shared documentation and template repositories,
- internal protocols for intake, decision-making and escalation.

These systems ensure that knowledge does not remain tacit or person-dependent, which is particularly important in small teams and project-based environments.

Equally important are **external coordination mechanisms**, including:

- structured collaboration with service providers and experts,
- cooperation agreements with public authorities,
- links to financing institutions and support programmes.

Clear internal roles, decision rules and reporting lines allow CESPs to balance flexibility with accountability. As services mature, these systems can be gradually expanded without changing the underlying service logic.

4.2 CESP service design

This section offers hands on guidance on service drafting process within CESP [4].
In general, following steps of CESP service design are recognised:

- Step 1: Defining the service
- Step 2: Service journey
- Step 3: Service intake and qualification setup
- Step 4: Service internal rules
- Step 5: Service ecosystem
- Step 6: Service prototyping
- Step 7: Service adjustment
- Step 8: Service scaling and automation
- Step 9: Service monitoring

Step 1: Defining the service

Objective: avoid building a service that is unclear, overloaded or impossible to deliver.

What you do:

1. Decide **who the service is for**. Limit yourself to a small number of user types (e.g. households, buildings, energy communities).
2. Decide **what problems you will help solve** and what you will *not* take responsibility for.
3. Define **2–4 standard service packages** that reflect typical needs (e.g. orientation, setup, project preparation, implementation support).
4. Write a short internal description of each package: purpose, typical duration, and expected outcome.

Decision checkpoint:

- Can a team member explain the service to a user in 2 minutes?
- Is it clear what falls outside the service scope?

If not, refine before moving on.

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Step 2: Service journey

Objective: ensure the service works as an end-to-end experience, not as isolated actions.

What you do:

1. Map the **basic user journey**: first contact → qualification → decision → support → follow-up.
2. Identify where users interact with the service and where internal decisions are made.
3. Decide where the service can stop without "failing" the user (e.g. after orientation).

This journey does not need to be detailed. Its purpose is to create **shared understanding within the team**.

Decision checkpoint:

- Does everyone know what happens after a user submits an inquiry?
- Is there a clear "end" to a case?

Step 3: Service intake and qualification setup

Objective: protect the service from overload and ensure focus on viable cases.

What you do:

1. Decide how users enter the service (form, e-mail, phone, in person).
2. Ensure all inquiries end up in **one place** (even a simple spreadsheet at first).
3. Define **basic qualification questions**, such as:
    - Who is the applicant?
    - What stage are they in?
    - What do they expect from the service?
4. Assign a **case manager role** responsible for intake and coordination.

The case manager does not solve everything; they ensure the case moves forward or closes clearly.

Decision checkpoint:

- Can you clearly say "yes", "not yet", or "no" to a request?
- Does every user get a clear next step?

Step 4: Service internal rules

Objective: create predictability for users and discipline for the team.

What you do:

1. Agree on **response times** (e.g. first response, indicative offer, decision).
2. Decide how decisions are made internally (individual vs. team).
3. Clarify what happens when capacity is exceeded.

These rules do not need to be public, but they must be shared internally.

Decision checkpoint:

- Would two team members handle the same case in a similar way?
- Are expectations manageable with current capacity?

Step 5: Service ecosystem

Objective: avoid trying to deliver everything internally.

What you do:

1. Identify **which parts of the service require external expertise**.
2. Select a small number of reliable partners (technical, legal, financial).
3. Clarify how and when partners are involved and who communicates with users.

The CESP remains the **coordinator**, not the contractor or investor.

Decision checkpoint:

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- Is it clear who does what once implementation starts?
- Do partners understand the role of the CESP?

Step 6: Service prototyping

Objective: test the service logic in real conditions.

What you do:

1. Select a limited number of similar cases (fast lane).
2. Apply the same service process to all of them.
3. Track:
    - time spent per step,
    - user questions and confusion points,
    - internal bottlenecks.

Do not aim for perfection. Aim for visibility of problems.

Decision checkpoint:

- Where does the process slow down?
- What creates unnecessary work or misunderstanding?

Step 7: Service adjustment

Objective: turn a pilot into a reliable service.

What you do:

1. Simplify steps that cause friction.
2. Clarify communication where users get confused.
3. Standardise what works.

Only now does it make sense to invest more time in tools and automation.

Decision checkpoint:

- Can the service be repeated without constant improvisation?
- Is staff workload predictable?

Step 8: Service scaling and automation

Objective: increase capacity without losing quality.

What you do:

1. Decide where scaling makes sense (more users, new segments, new areas).
2. Automate repetitive steps, not judgement-heavy ones.
3. Keep human contact where trust and decision-making matter.

Scaling can also mean improving speed or reliability, not only volume.

Step 9: Service monitoring

Objective: ensure the service creates real value and remains relevant.

What you do:

1. Track **primary impact**: what real-life change does the service create for users (clarity, confidence, action)?
2. Track **secondary effects**: investments, members, energy produced or saved.
3. Collect qualitative insights from users and staff.

Use data to **improve the service**, not just to report it.

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4.3 CESP services portfolios

Portfolios or list of possible mandatory and auxiliary CESP services have been identified during the process of development and analysis of different CESP systems. Identified portfolios of CESP services include:

- Informing & Mobilisation (Initiation phase)
- Advisory & legal support (planning phase)
- Technical support (development phase)
- Financial support (financing phase)
- Stakeholder facilitation & project management
- Digital & data services
- Post-implementation & monitoring support

1. Informing & Mobilisation (Initiation phase)

Mandatory:

- Awareness campaigns, promote and support online guides and public events explaining benefits and steps of forming energy communities.
- Landing page with simplified "how-to-start" flow, templates, and contact form; building knowledge hub.
- Basic legal and financial FAQs based on EU and national frameworks.

Auxiliary:

- Community self-assessment tool for readiness level.
- Local storytelling ("success map") showing best national examples.
- Capacity building – provides trainings, online materials, and mentoring to build local skills of citizens and public bodies

2. Advisory & legal support (planning phase)

Mandatory:

- Legal templates (statutes, contracts, incorporation forms).
- Guidance on legal entity types (association, cooperative, company).

Auxiliary:

- Support in registration and compliance with national regulation.
- Personalized one-on-one consultancy for legal setup.
- Legal helpdesk offering fast-track responses.

3. Technical support (development phase)

Mandatory:

- Preliminary technical assessment.
- Linking communities with trusted engineers, installers, and DSOs.

Auxiliary:

- Technical documentation checklist for permitting and connection.
- Creation of "peer-to-peer pool" of technical experts.
- Simplified simulation tools for energy sharing benefits.

4. Financial support (financing phase)

Mandatory:

- Information on subsidies, loans, and national funding programs.

Auxiliary:

- Financial modelling (CAPEX/OPEX, LCOE, ROI).
- Access to coalition-level financial mechanisms and banks.

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- Crowdfunding and citizen investment facilitation.
- Pilot revolving fund for small community projects.
- Financial advisory to national bodies based on feedback from piloting actions.

5. Stakeholder facilitation & project management

Mandatory:

- Stakeholder mapping and facilitation among municipalities, DSOs, and citizens.
- Ongoing project progress tracking.

Auxiliary:

- Introduction of digital CRM for community coordination.
- Mediation during conflicts or coordination challenges.
- "Community coach" mentorship program to improve team dynamics.

6. Digital & data services

Mandatory:

- National CESP online page integrating information, templates, and contact points.
- Repository of business models, examples, and policy materials.

Auxiliary:

- Interactive dashboards for project tracking and KPI monitoring.

7. Post-implementation & monitoring support

Mandatory:

- Guidance on maintenance, governance, and expansion.

Auxiliary:

- Periodic performance reviews and reporting templates for communities.
- Annual "community review" events to share lessons and recognize best practices.
- Connection with academic partners for impact evaluation.
- **Monitoring & evaluation service** – tracks supported initiatives, measures impact and contributes to COMET KPI reporting.

4.4 CESP sustainability

Long-term sustainability of Community Energy Service Points (CESPs) cannot rely on a single predefined model, as it is highly dependent on national market maturity, institutional arrangements and the mandate of the hosting organisation. In practice, CESPs that operate in more developed markets tend to gradually expand and professionalise their service portfolios, building revenue streams around advisory, project development and facilitation services. In less mature markets, CESPs increasingly play a public-interest role by supporting municipalities, ministries or funding bodies that have financial resources available but lack operational capacity, eligibility screening or procedural support.

This dual pathway—market-based service expansion where feasible, combined with structured public-interest service provision where markets are not yet developed—has emerged as the most realistic approach to ensuring long-term relevance and continuity. It allows CESPs to remain operational beyond initial project funding, while avoiding stagnation, loss of institutional knowledge or the common discontinuation of project-funded platforms once formal funding ends. In the developed market there are current service providers that "upgrade" their services based on CESP approaches and are usually focused on part of the market aspect interesting to expand on existing services in their portfolio (for example: project designers & investors expanding their market services with community).

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5. Checklists and guidance for successful service delivery

This chapter offers exhaustive checklist, templates, decision steps , rules, reflective questions, explanations and other guidance that are key to delivering successful C ESPs.

The following general types of activities are identified:

1. Case intake and case handling
2. Partner engagement
3. Operating rules and service discipline
4. Communication logic and user motivation
5. Learning, feedback and system improvement
6. Guidelines and operational tools

5.1 Case intake and case handling

This subchapter describes the core tools for first contact with users and structured case handling within a CESP. The templates and checklists are used **from the moment an inquiry is received** until a decision is taken on the scope and type of support. They are primarily used by **CESP case managers** to ensure consistent intake, capacity protection, and transparent early decision-making.

5.1.1 Inquiry intake and triage - an operational checklist

This checklist is used for every incoming inquiry, regardless of the entry channel (web, email, phone, event). It supports case managers in quickly understanding who the user is, what they are asking for, and whether the request falls within the CESP mandate. The checklist is applied before any substantive advice is given, preventing ad-hoc responses and premature use of resources.

Application steps; handling any inquiry:

1. *Receive inquiry through defined entry channel >> Register inquiry in the central system >> Assign responsible case manager*
2. *Clarify the request and user profile >> Perform quick readiness and scope check*
3. *Decide on next step: accept, defer, or redirect >> Communicate decision clearly to the user >> Close intake phase*

Template creation - What is collected or drafted during intake:

Inquiry record:	*Contact details, date, channel, short description of request*
User profile:	*Type of user (household, building, energy community, public body)*
Motivation snapshot:	*Primary driver: cost, independence, community, compliance, funding*
Readiness status:	*Idea / early organisation / defined concept / implementation-ready*
Service relevance:	*Within CESP mandate: yes / no / partially*
Triage decision:	*Information only / deferred / accepted as case*
Next step note:	*Clear instruction on what happens next and when*

Operational rules for case manager:

1. No inquiry is processed without registration.
2. No detailed advice before triage decision.
3. One inquiry = one responsible case manager.
4. Capacity and impact define priority, not urgency.
5. Every inquiry ends with a clear outcome.

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5.1.2 Case steering and decision-making checklist

This checklist is used after a case has been accepted, to manage the depth, duration, and boundaries of CESP involvement. It supports case managers and CESP leaders in deciding whether to continue, adjust, hand over, or close a case. The checklist is applied at key progress points to maintain focus on impact and avoid over-engagement.

Application steps; steering cases when accepted:

1. *Clarify what success looks like for the case >> Decide how much support is justified*
2. *Define where CESP involvement must stop >> Identify when partners take over*
3. *Monitor progress through clear checkpoints >> Decide whether to continue, adjust or stop >> Close the case deliberately*

Case decision steering – defining delivery of case/not intake information:

Case objective:	*What concrete result this case should achieve (one sentence)*
Service package to be applied:	*Initiation / Advisory / Acceleration*
Scope boundaries:	*Included activities / explicitly excluded activities*
Delivery blocks:	*Discrete steps or outputs required to complete the case*
Responsibility map:	*CESP lead / user role / external partners*
Checkpoint schedule:	*When progress is reviewed and decisions are made*
Completion criteria:	*What must be true for the case to be considered finished*
Closure summary:	*What was achieved, partially achieved, or stopped*

5.2 Partner engagement

This subchapter provides a guidance for structured cooperation with external partners (legal, technical, financial, public bodies). The approaches are used **when delivery relies on third parties** or when multiple actors must be coordinated around a single case. They are primarily used by **CESP coordinators and leaders** to ensure role clarity, delivery quality, and risk control.

High quality and responsible partner engagement is key to CESP that is bridging market of potential cases and service providers. Below, groups of guidances on partner management in delivering CESP services are provided.

5.2.1. Defining the business relationship

Defining the business relationship **is mandatory step before engagement with the partner**. The following **must be explicitly defined**:

1. **Role** – what the partner delivers (and what they do not).
2. **Trigger** – when and by whom the partner is involved.
3. **Decision authority** – what the partner can decide vs. what remains with CESP.
4. **Communication** – who speaks to the user and how.
5. **Time expectations** – response times and availability.
6. **Quality standard** – level of detail, user-friendly language, documentation.
7. **Exit condition** – when and how cooperation ends.

Rule of thumb: If more than two elements are undefined → **pause engagement**.

5.2.2. Partner engagement rules during case delivery

Before involving a partner, mandatory actions are:

- Define case objective
- Set scope boundaries
- Clarify CESP role and limits

When involving a partner:

- Partner receives a short case brief (objective, scope, expected output)

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- One communication channel defined for case (usually true CESP as authority)
- Decision authority is clarified between two parties

During delivery:

- Progress checked at predefined checkpoints
- CESP intervenes if timelines slip, scope expands, or users are confused

After delivery:

- Partner performance assessed using the monitoring table
- Decision taken: continue, limit, or disengage

Keep in mind: Core operational rule is that partners support delivery. They never steer the case or the user.

Following tables 10, 11 & 12, help in day-to-day engagement and evaluation of partners in the CESP ecosystem and they can also be used while defining expectations and standards of relationship between CESP and partners.

Table 10. Partner engagement criteria

Service relevance	• Provides expertise the CESP cannot or should not deliver internally. • Needed across multiple cases or for high-risk steps.
Reliability	• Demonstrated ability to deliver on time and as agreed. • No history of repeated delays or informal scope expansion.
Alignment with CESP mandate	• Understands citizen-led and community energy projects. • Does not push solutions that primarily serve their own business model.
Communication quality	• Can explain complex issues to non-experts. • Respects CESP role as primary interface to users.
Conflict of interest check	• No incentive to bias advice or decision-making. • Transparent about commercial interests.

Table 11. Partner performance monitoring: decide whether to continue, limit, or disengage a partner based on real performance.

Performance dimension	What to observe	Rating (Good / Mixed / Poor)	Evidence from cases
Responsiveness	Timeliness of replies, availability when needed		
Quality of outputs	Accuracy, clarity, usability of deliverables		
Impact on case duration	Did involvement speed up or slow down cases?		
User feedback	Trust, satisfaction, clarity from user perspective		
Coordination effort	Amount of CESP time needed to manage partner		

Table 12. Partner performance results/criteria: Performance decision

Outcome	When to apply
Continue cooperation	Consistently good performance, low coordination cost
Limit use	Suitable only for specific case types or volumes
Replace / disengage	Repeated delays, misalignment, or quality issues

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5.3 Operating rules and service discipline

This subchapter defines the internal operating rules that ensure the CESP functions as a controlled service system (Table 13), rather than a collection of ad-hoc activities. The rules and decision principles are applied continuously in day-to-day work and serve as a shared reference for all team members. Their purpose is to protect capacity, ensure consistent delivery, and manage user expectations. This table defines the response frequency and rules of engagement applied by the CESP when interacting with different user categories. It clarifies expected response times, communication channels, and engagement logic to ensure consistent, transparent, and capacity-aware service delivery.

Rule of thumb: CESP does not persuade or chase users. It remains visible, credible and available until the user is ready.

Table 13. Response frequency and rules of engagement of CESP staff and ecosystem

User category	Typical profile	First response SLA	Channel & format	Substantive response / engagement logic
U1 – Information seeker	Citizens or initiatives expressing general interest, no clear intention to develop a project	**1 working day**	E-mail (standardised reply)	No individual case handling. Direct to scalable channels: newsletter, guides, public workshops, events. Invite to re-contact once intention becomes concrete.
U2 – Early-stage initiative	Interest and idea exist, but no structured project yet	**Phone call within 1–2 working days**	Telephone call (15–20 min)	After call: • If no decision to proceed → newsletter + workshops • If decision to proceed → enter procedural flow (qualification → next step).
U3 – Active / advanced initiative	Clear intention and readiness to develop a project	**Scheduled appointment**	In-person meeting or field visit	Procedural engagement depends on project phase (initiation, advisory, acceleration). Communication follows milestones, not ad-hoc requests.
U1a – Institutions / partners	Public bodies, financial institutions, contractors	**Scheduled appointment**	Direct bilateral communication	Not handled under CESP SLA. Managed through partnership, governance or management channels.
U2a – Non-active users	All above	**Periodic engagement**	Newsletter, workshops, info sessions, public events, regular updates	Non-active users can be periodically engaged to become one U1-3 categories.

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5.4 Communication logic and user motivation

This subchapter contains guidelines for structured communication with users across different stages of readiness and engagement. The provided approach and communication logics are used **throughout the entire user journey**, from first contact to case closure. They are primarily applied by case managers and communication staff to increase clarity, trust, and user readiness to act.

5.4.1 Motivation framework for CESP users

These motivation principles drive user decisions and enhance communication of operations and support staff. It reveals user motivations when reaching to the CESP and speeds up the process of project development. The four core motivators that drive human behaviour are usually **R**ewards, **I**deology/identity, **C**ause/community and **E**ase/risk avoidance, usually identified by RICE acronym.

1. Reward driven motivation (R – Rewards)

These users are motivated by **tangible benefits** and measurable outcomes. Typical drivers include: financial savings or returns, reduced energy bills, access to funding or incentives, concrete improvements to property or assets. They are often pragmatic, result-oriented and impatient with abstract discussions.

How to recognise them:

- They ask early about costs, savings, payback or grants.
- They want numbers, timelines and comparisons.
- They are interested in “what do we get out of this”.

How to communicate:

- Translate complexity into **clear benefits**.
- Use concrete examples, scenarios and ranges rather than exact promises.
- Emphasise progress milestones (“after this step, you will have…”).

What to avoid:

- Overloading them with governance or ideological arguments.
- Long discussions about values without linking them to outcomes.

2. Identity driven motivation (I – Ideology/Identity)

These users are motivated by **recognition, identity and status**. Their engagement is linked to: being seen as pioneers or leaders, representing their community or organisation and leaving a visible legacy. This motivation is common among community leaders, municipal representatives and initiative founders.

How to recognise them:

- They talk about “setting an example” or “being first”.
- They care about visibility, narratives and public perception.
- They often reference responsibility or leadership.

How to communicate:

- Emphasise the **symbolic and reputational value** of the initiative.
- Frame progress as leadership, not just completion.
- Highlight how their role contributes to broader change.

What to avoid:

- Treating them as purely technical stakeholders.
- Downplaying the importance of visibility and recognition.

3. Cause driven motivation (C – Cause / Community)

These users are motivated by **shared progress and collective benefit**. Their focus is on: community resilience, fairness and inclusion and contributing to a broader mission. They are often patient but vulnerable to burnout if progress stalls.

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How to recognise them:

- They use “we” more than “I”.
- They care about participation, transparency and inclusion.
- They are concerned about who benefits, not only how much.

How to communicate:

- Emphasise **collective impact and shared learning**.
- Break complex processes into understandable group steps.
- Reinforce that slow progress does not equal failure.

What to avoid:

- Over-focusing on individual gains.
- Ignoring group dynamics and internal alignment.

4. Security-driven motivation (E – Ease / Risk avoidance)

These users are motivated by **certainty and risk reduction**. Their primary concern is avoiding: legal or financial mistakes, public embarrassment and irreversible decisions. They are not opposed to action, but need reassurance and structure.

How to recognise them:

- They repeatedly ask “what if” questions.
- They are concerned about responsibility and liability.
- They hesitate at decision points.

How to communicate:

- Reduce uncertainty by explaining **process, safeguards and options**.
- Emphasise reversibility and step-by-step progression.
- Normalise caution as rational, not obstructive.

What to avoid:

- Pushing urgency or emotional pressure.
- Presenting decisions as all-or-nothing.

5.4.2 Communication principles for CESP operations and support teams

This subchapter offers indicative instructions learned from sales, but they apply to many other CESP services to ensure quality and effectiveness of communication with CESP users.

Rule of thumb advice on how to move forward. Every interaction (e-mail, call, meeting) must satisfy **at least 8 of the 12 points below** [5]:

1. Demonstrate clear understanding of the user’s problem
2. Speak in terms of **benefits**, not technical solutions
3. Focus on the **next step**, not the entire process
4. Reduce uncertainty (what happens, how, when)
5. Never promise what is outside CESP control
6. Always define a **timeframe**
7. Give the user a **sense of choice and agency**
8. Avoid technical jargon in first interactions
9. Ask **one clear question** per interaction
10. Close each interaction with a clear outcome
11. Reinforce the value of the user’s decision (no pressure)
12. Never leave communication open-ended

Golden rule: If the user does not know what happens next, the communication has failed.

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5.4.3 Question-based guidance for moving cases forward

Simplified version of communication steps for direct communication with CESP users:

1. Anchor question (always ask first)

"What would make this project a success for you?"

Guidance:

Ask this question early in the conversation. Let the person answer freely and do not interrupt. The first elements they mention usually reveal the **dominant motivation**. Listen for whether they speak about benefits, recognition, collective impact, or risk reduction. After that choose appropriate follow-up.

2.a Follow-up – Rewards check (use if benefits or outcomes dominate)

"Which concrete benefit matters most to you in that success?"

Guidance:

Use this question to confirm whether the person is primarily motivated by tangible outcomes such as savings, returns, funding, or time efficiency. Keep the discussion focused on measurable or practical gains.

2.b Follow-up – Ideology / identity check (use if role or visibility appears important)

"Who do you think will notice or be affected if this project succeeds?"

Guidance:

This question helps identify whether recognition, leadership, or representation plays a central role. Pay attention to references to community standing, public perception, or being a role model.

2.c Follow-up – Security / risk check (use if hesitation or caution is visible)

"What would need to be in place for you to feel comfortable moving forward?"

Guidance:

Use this question when decisions stall or concerns are repeatedly raised. The answer often reveals the key risk, uncertainty, or missing reassurance that must be addressed before progress is possible.

Final reminder for CESP staff: Do not ask more questions to understand the project. Ask better questions to understand the person.

5.5 Learning, feedback and system improvement

This subchapter focuses on tools that allow the CESP to systematically learn from practice and improve its services over time. The templates are used periodically (e.g. monthly, quarterly, or after case closure) and are intended for internal teams and CESP leadership. Their role is to turn operational experience into improved processes, service design, and policy feedback.

5.5.1 Knowledge transfer routines and capture rules

Opportunities for knowledge transfer:

- Periodic; major external change (law, funding, market) → triggers ad-hoc session
- Weekly internal knowledge session (mandatory)
- Case closure (short capture, if needed)

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Knowledge transfer session (core format)

Frequency: once per week

Duration: 30–45 minutes (up to 120 min for major updates)

Participants: all active case managers + CESP lead (or broader audiance if needed)

Format: informal discussion + structured capture (or offical webinar if major updates are beeing discussed)

Indicative agenda items:

- What repeated this week?
- What broke or slowed cases?
- What confused the users?
- What decision rules were unclear?
- What should we change next week?

Weekly knowledge transfer

(must result in **at least one of the following**):

- Clarified decision rule
- Updated template
- Adjusted service scope
- Changed communication wording
- Identified outsourcing nee

What knowledge is discussed (focus areas)

During the weekly session, discussion is **strictly limited** to:

A. Case handling

- Where did cases get stuck?
- What caused delays (user, partner, internal)?
- Which case required disproportionate effort?

B. User behaviour & motivation

- What triggered user decisions?
- What caused hesitation or drop-out?
- What expectations were unrealistic?

C. Process & rules

- Where did we improvise?
- Which step was unclear or redundant?
- Where did we violate our own SLA or logic?

D. Templates & tools

- Which template needed adjustment?
- What information was missing or unnecessary?
- What users did not understand in documents?

What gets captured (and how)

Only **actionable knowledge** is captured.

Mandatory capture after each weekly session:

- 3–5 recurring issues (max)
- 1–2 concrete process improvements
- 1 template or rule to review or update

Capture format:

- Bullet points (not prose)
- Stored in one shared location
- Dated and tagged (case type / topic)

Key questions to ask across cases

During knowledge transfer, always ask:

- Where are we spending time that does not create value?
- Where are users making the same mistakes?
- Where are expectations misaligned?
- Which part of the service feels fragile?
- What would make the next case easier?

Immediate intervention if: Same questions appear every week, different staff give different answers to users, rules exist but are ignored, templates are constantly bypassed and one person carries all know-how.

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5.5.2 Feedback loops in CESP delivery systems

A positive feedback loop is a repeating pattern where: **an action produces an effect that reinforces the conditions for the same action to happen again, with less effort [2]**.

In a CESP context, this usually means:

- better users → better cases
- better processes → faster delivery
- better partners → smoother implementation
- better results → stronger legitimacy

Once activated, these loops **reduce friction** and **increase system momentum**.

How to read and use feedback loops: Each feedback loop should be understood through three elements.

1. **Trigger** – what starts the loop
2. **Reinforcement mechanism** – why the loop strengthens itself
3. **Scaling signal** – how you know the loop is working

CESP leaders should regularly ask:

- Which loops are already active?
- Which loops are weak or blocked?
- Where should we intervene to amplify them?

1. User and demand loops: How users strengthen the system?

These loops determine the **quality of demand**, not just its quantity.

Example logic: Clear communication and predictable processes increase user confidence. Confident users arrive better prepared, make decisions faster and refer others. This raises the average quality of incoming cases and reduces time spent on basic explanations.

Why it accelerates the system: Better users require less effort per case, allowing the same team to achieve more impact.

Scaling signals:

- Higher share of referral-based inquiries
- Shorter time from first contact to decision
- Fewer “exploratory-only” requests

2. Process and operational loops: How internal structure creates speed?

These loops shape how efficiently the CESP converts effort into results.

Example logic: Standardised intake and case handling lead to faster decisions. Faster decisions create clearer learning signals. Better learning improves qualification rules, which further reduces wasted effort.

Why it accelerates the system: The organisation learns which cases to support and which to decline earlier, freeing capacity for high-impact work.

Scaling signals:

- Increasing conversion rate from inquiry to implementation
- Stable delivery times despite higher volume
- Reduced internal coordination overhead

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3. Partner and network loops: How the ecosystem reinforces delivery?

These loops define whether the CESP acts alone or as a trusted hub.

Example logic: Reliable partners enable smoother implementation. Smooth delivery builds trust among users and institutions. Higher trust attracts better partners and more complex projects.

Why it accelerates the system: The CESP gains leverage: outcomes improve without proportional management effort.

Scaling signals:

- Partners proactively coordinating with the CESP
- Reduced need for supervision and escalation
- New partners approaching the CESP organically

4. System and policy loops: How practice reshapes the environment?

These loops operate on a longer time horizon but create structural acceleration.

Example logic: Documented real-life experience feeds into policy discussions. Improved rules reduce friction for future projects. Easier projects generate more cases and more evidence.

Why it accelerates the system: The system itself becomes easier to operate over time.

Scaling signals:

- Procedures becoming simpler or clearer
- Institutional recognition of the CESP as a reference point
- Access to operational funding based on proven impact

5.6 Guidelines and operational tools

This subchapter brings together concrete operational templates used **directly in case delivery and CESP management**. These are not illustrative examples, but working tools that are completed and updated during real cases. They are primarily used by case managers and CESP leaders **once a decision to work on a case has been made**.

5.6.1 Case management guidelines

These guidelines describe the main working principle for managing an individual case, used from initial qualification through to case closure. It is maintained by the responsible case manager and serves as a shared reference for all internal and external actors involved.

The guidelines consist of 4 general phases, out of which phases I–III are mandatory and form the basis for deciding whether a case should proceed.

Energy community & energy sharing CESP CASE guidance overview:

- **Phase I–III = core workflow (mandatory)**
- **Phase IV = living case file**

NOTE

- If phases I–III are weak → **do not push case forward**
- Most value comes **before technical details**

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PHASE I. CORE INTAKE – mandatory (5-minute call)

≈ 5% information/ 80% decisions making about continuing the case (identify person, their goals and make decision)

1. **Basic identification** *Case ID, Date / channel of contact: (phone / e-mail / event / referral), CESP case manager.*
2. **Who is contacting us:** *Name & surname, Organisation / informal group, Role: (citizen, building representative, initiative lead, municipality, other), Phone / e-mail:*
3. **Type of inquiry (first signal)**
   - Energy community (REC / CEC)
   - Energy sharing – multi-apartment building
   - Individual project / unclear
   - General information only
4. **Verbatim; a one-sentence problem statement:** *"In one sentence: what are you trying to achieve?"*
5. **Immediate next step**
   - Schedule follow-up call
   - Send basic info & close
   - Redirect to partner
   - Not in scope

PHASE II. FIRST-LEVEL SCREENING & RELATION BUILDING (20/80)

≈ 20% effort / 80% understanding

6. **Personal context & relationship**
   - How did they hear about CESP?
   - What is their current situation? (workload, stress, urgency)
   - Why is it difficult to talk now (if applicable)?
   - When is a good moment to reconnect?
7. **Motivation & interest (RICE – simplified)**
   - **Reach***: Who else is involved or affected? (residents, neighbours, co-owners)*
   - **Impact:** *What change do they personally want? (money, control, fairness, climate)*
   - **Confidence:** *How sure do they sound? (Curious / Motivated / Already decided)*
   - **Effort(perceived):** *Do they see this as easy, manageable, or overwhelming?*
8. **Trust & engagement signals (internal) -** *(Early signals of seriousness.)*
   - Responds clearly
   - Asks concrete questions
   - Follows up
   - Brings others into conversation
9. **Agreed next step**
   - Second call scheduled (date)
   - Documents / info sent
   - Waiting for user action
   - Case paused

PHASE III. DECISION POWER – "CAN THEY MOVE?"

Decision: Force to proceed / go–no go logic

10. **Decision capacity**
    - Do they represent the group formally? (yes / no)
    - Do they have contact with co-owners / residents? (yes / no)
    - Is there any formal mandate? (yes / no)
11. **Organisational readiness**
    - Agreement among co-owners started

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- Building manager involved
- Municipality / public body aware

12. **Financial readiness (rough)**
    - Own funds considered
    - Interested in loans
    - Interested in grants
    - No idea yet
13. **What they actually need from CESP**
    - Orientation / clarity
    - Project management
    - Technical concept / installer
    - Legal setup / contracts
    - Financing support
    - Energy sharing setup
14. **CESP decision**
    - Proceed with structured support
    - Orientation only (close after)
    - Redirect externally
    - Not feasible now

Write down your decision rationale (2–3 lines):

PHASE IV. ADVANCED CASE DEVELOPMENT – optional / over time

15. **Location & asset details:** *Address / location, Building type & size, Roof / technical assets, Metering situation*
16. **Legal & organisational pathway:** *Target model (REC / sharing / hybrid), Legal form considered, Required documents (statutes, agreements, NDA)*
17. **Technical & financial concept:** *Technology & capacity, Investment estimate, Financing mix, External partners*
18. **Implementation & coordination:** *CESP role, Partners involved, Risks & mitigation*
19. **Outcomes & impact:** *Members involved, kW / kWh, € mobilised, Real-life change (qualitative)*
20. **Learning & replicability:** *Key bottlenecks, What worked well,Replicability potential*
21. **Case closure:** *Closure reason, Follow-up actions, Policy feedback (if any)*

5.6.2 Funding list guidelines

These guidelines are used to maintain a simple, up-to-date and operational overview of relevant funding opportunities. It supports both internal use and public access where appropriate and is updated on an ongoing basis or when new calls open. Its purpose is fast orientation and decision support, not in-depth funding analysis.

Mandatory fields (minimum viable entry)

1. **Funding name:** *Official name of the scheme or programme.*
2. **Funding type:** *Grant / loan / guarantee / blended / voucher / technical assistance.*
3. **Target users;** Who can apply:
    - individuals / households
    - associations
    - cooperatives / energy communities
    - municipalities / public bodies
4. **Supported activities:** *Short description (e.g. PV installation, storage, feasibility study, organisational setup).*

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5. **Basic eligibility criteria;** 3–5 bullet points max, such as:
    - legal form required
    - minimum maturity level
    - geographic scope
    - type of technology
6. **Funding range:** *Indicative amounts or percentage (if publicly available).*
7. **Responsible institution / contact:** *Managing authority or intermediary + link or general contact.*
8. **Status:** *Open / upcoming / closed / continuous*.

5.6.3 CESP online solution

This section defines the core elements of the CESP's digital presence as the **primary entry point for users**. It is used by teams designing or upgrading the CESP website and digital tools, typically during setup or redesign phases. The objective is to ensure a clear entry point, self-service options, and a reduction of repetitive inquiries.

CESP website usually has most of these elements:

- **Landing page about energy communities** – clear information plus a call to action (e.g. "Find out how to get started").
- **General information on energy communities** – reasons for founding, possible activities, key benefits.
- **List of business models** – 1–3 of the most common national models and 1–3 EU examples (e.g. cooperative, association, hybrid model).
- **Contact and outreach** – contact form, e-mail, phone number and links to social media.
- **Knowledge hub & training** – materials about legal forms, starting energy projects and specific provisions for energy communities.
- **List of partners and support organisations** – institutions and experts who offer consultancy or services.
- **Funding list** – an up-to-date list of available grants, subsidies and funding programmes.
- **Webinar and training list** – calendar of upcoming sessions and recordings of past events.
- **Direct downloadable materials** – forms, guides, contract templates and checklists.
- **Blog/news section** – news about projects, regulatory changes and best practices.
- **Contact form** – a simple way for users to submit questions or express interest in support.

5.6.4 Proposal for localised documentation for day-to-day operation

These guidelines are used to structure and deliver **localised document bundles** tailored to a user's development stage and specific needs. It supports CESP teams in reducing operational noise and delivering only what is relevant at a given moment. Bundles are triggered **based on case maturity or concrete opportunities** (e.g. funding calls, pilots, regulatory changes).

Localised bundles are **pre-assembled sets of documents, tools and learning materials** that support users at specific stages of energy community or citizen energy project development. Their purpose is to **reduce friction, save time and ensure legal and procedural consistency**, without overwhelming users with irrelevant or premature information.

Bundles are not static knowledge libraries. They are **context-aware delivery packages**, shared:

- when a user reaches a certain maturity level,
- when a specific opportunity arises (e.g. funding call, pilot),
- or when a recurring question appears during case handling.

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Typical content categories

1. **Legal and organisational documents**
   - model statutes (association, cooperative, energy community),
   - registration forms and guidance notes,
   - internal rules or member agreements.
2. **Contracts and templates**
   - energy sharing agreements,
   - NDAs,
   - cooperation or participation agreements,
   - basic service or consultancy agreements (if applicable).
3. **Guides and explanatory notes**
   - short "how-to" guides written in plain language,
   - national regulatory explanations,
   - decision trees or flowcharts.
4. **Learning materials**
   - recordings of webinars or workshops,
   - slide decks,
   - short explainer videos.
5. **Partner materials**
   - officially endorsed templates,
   - guidance provided by public bodies, DSOs or funds,
   - external tools referenced by the CESP.

How bundles are structured

Each bundle should follow a **standard internal structure**, regardless of content.

Recommended bundle structure:

1. **Bundle title and purpose -** One sentence explaining *why* the bundle exists and *when* it should be used.
2. **Who this bundle is for -** Clear indication of target users and development stage.
3. **What this bundle enables -** Short list of outcomes (e.g. "prepare founding documents", "understand energy sharing contracts").
4. **Included materials -**List of documents and links, grouped by category.
5. **How to use this bundle -** 3–5 bullet points explaining sequence or priorities.
6. **Limits and disclaimers -** Clear statement on legal responsibility and need for professional advice.

Delivery modes to users.

Bundles can be delivered in three ways, depending on context:

1. **On-demand delivery**
   Sent when a user explicitly requests information or reaches a defined stage.
2. **Opportunity-based delivery**
   Sent proactively when:
   - a funding call opens,
   - a pilot is launched,
   - a regulatory change affects ongoing cases.
3. **Public availability**
   Selected bundles may be published publicly when:
   - content is stable and non-sensitive,
   - it supports awareness and self-service,
   - it reduces repetitive inquiries.

   Public bundles should always be accompanied by a short disclaimer.

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6. Prototyping of minimal viable operating system

The Minimum Viable Operating System (MVOS) defines the smallest set of operating rules, processes, roles and tools that makes a CESP functional, credible and controllable from day one. It is not a minimum service catalogue and it is not an organisational chart [4].

MVOS is the operating backbone that prevents ad-hoc delivery, protects capacity and enables learning-by-doing in low-maturity markets. MVOS is designed to be transferable across countries because it focuses on universal service mechanics (intake, decision rules, case handling, partner activation, and a feedback loop), while allowing localised content (laws, incentives, templates, partner names) to sit on top.

What a CESP looks like when MVOS is in place

A CESP with MVOS in place behaves like a controlled service system rather than a collection of helpful activities. Users experience one clear entry point, fast and fair triage, transparent next steps and consistent follow-up. Internally, staff work from a shared case file, apply the same decision rules, and escalate to partners or experts only when the case is qualified.

Observable features (frontstage):

- One entry point logic: website form and/or email/phone all end up as one registered case.
- Clear expectations: what the CESP does, does not do, and how decisions are made.
- Fast response discipline: acknowledgement within 1–2 working days; decision or next action within a defined timebox.
- Repeatable packages: users receive a structured output (guidance note, action plan, referral bundle), not improvised advice.
- Consistent follow-up: the user knows who the case manager is and when the next checkpoint happens.

Observable features (backstage):

- A single case file per user request, with mandatory fields (who, what, readiness, decision, next step).
- Decision rules that protect capacity (prioritisation, gatekeeping, escalation thresholds).
- A small but reliable partner activation method (legal/technical/finance experts without losing neutrality).
- A minimal knowledge base that prevents repeating the same explanations and documents.
- A weekly operating rhythm that ensures cases move forward and learning is captured.

MVOS components

1) Entry, intake and triage

The intake and triage system is the first capacity protection mechanism. The goal is to convert an incoming request into a structured case within 10–20 minutes and decide the service path. The system must work regardless of channel or language, and should not depend on localised legal content.

Elements of entry, intake and triage system:

- Intake form or script with core fields: user type, location, asset/context, goal, urgency, constraints, contact, consent.
- Triage criteria: scope fit, readiness level, potential impact, time-sensitivity, required expertise, risk flags.
- Service path decision (three-way): orientation (self-service), structured support (case-managed), referral/redirect (out of scope).
- Timeboxes: acknowledgement and triage deadlines, and a rule for what happens when the queue grows.
- Mandatory documentation: record the decision and the reason in the case file.

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2) Gatekeeping and prioritisation rules

Gatekeeping is not 'saying no'; it is maintaining service integrity. MVOS requires explicit rules to avoid becoming a general helpdesk or an unpaid consultant for complex projects. Prioritisation should be fair, transparent and explainable.

Elements of gatekeeping and prioritisation rules:

- Scope rules: what is always in scope, conditionally in scope, and out of scope.
- Readiness thresholds: minimum organisational conditions for deeper support (e.g., identified champion, mandate, basic data).
- Impact lens: preference for cases that unlock replication, learning, or public value (not only the loudest requests).
- Escalation thresholds: when to activate experts or partners (and when not).
- Queue management: caps per case manager, freeze rules during peaks, and a 'waitlist with guidance' process.

3) Case management and user relationship

Case management is the core operating discipline of CESP delivery. It ensures continuity, prevents loss of context, and makes the service auditable. A case manager does not solve everything; they coordinate, timebox, document and move the case through the service path.

Elements of case management and user relationship:

- Case ownership: one named person responsible for progress, communication and closure.
- Case stages: opened -> qualified -> packaged -> supported -> closed (with clear stage definitions).
- Checkpoints: scheduled touchpoints; no 'silent drifting' cases.
- Escalation and handover: rules for reassignment, expert involvement, and conflict of interest handling.
- Closure logic: define what 'done' means per service path and how follow-up or re-entry works.

4) Service packaging and outputs

MVOS does not require a full-service catalogue, but it requires standard outputs. Users must receive a service package that clarifies next steps. Packaging allows the CESP to deliver consistent value while limiting bespoke work.

Elements of service packaging and outputs:

- Orientation package: links, short guidance note, minimum steps, and when to return.
- Structured support package: timeboxed action plan with roles, documents needed and decision points.
- Referral package: vetted contacts or institutions, what to ask for, and what information to bring.
- Decision record: a short, user-friendly explanation of the decision and the path chosen.
- Language and accessibility: outputs should be understandable to non-experts; legal language is translated into 'what this means for you'.

5) Partner and expert activation

CESPs rarely have all expertise in-house. MVOS defines how to activate external expertise without losing neutrality or creating procurement burdens. The goal is to have predictable interfaces: when an expert is involved, what they receive, what they return, and how conflicts are handled.

Elements of partner and expert activation:

- Expert pool definition: categories (legal, technical, finance, engagement) and activation criteria.
- Briefing template: what the expert gets (case summary, question, deadline, limits).
- Output template: what the expert returns (short note, assumptions, next steps).
- Neutrality safeguards: conflict of interest declarations; clear rule that the CESP does not endorse commercial offers.
- Partner feedback loop: capture common blockers and feed them into policy or knowledge-base updates.

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6) Minimal knowledge base and internal tooling

A minimal knowledge base reduces repetitive work. In early maturity stages, it can be a structured folder or wiki; the key is discipline and version control. MVOS requires only a skeleton: FAQs, checklists, and standard outputs.

Elements of minimal knowledge base and internal tooling:

- FAQs and misconceptions: short answers to the 20 most common questions.
- Document library: templates, sample emails, briefing notes, and a 'what to prepare' list for users.
- Decision rules repository: one authoritative place where staff can check scope and prioritisation rules.
- Case file storage: consistent naming, access rules, and GDPR-safe handling.
- Basic CRM discipline: one place to track case status, owner, and next action.

7) Learning loop and minimal monitoring

MVOS requires a lightweight learning loop from the first month. Monitoring is not a dashboard project; it is a minimal set of indicators that show whether the service is functioning and where capacity is leaking.

Elements of learning loop and minimal monitoring :

- Service flow: number of incoming requests, triage outcomes, and conversion to structured support.
- Timeliness: acknowledgement time, time to decision, and average case duration by path.
- Quality signals: user satisfaction (simple score), and reasons for dissatisfaction.
- Outcome proxies: number of projects advanced to next milestone, capacity building actions triggered, funding opportunities matched.
- Learning capture: a short 'lessons learned' log and monthly review notes.

30/60/90-day operating rollout (MVOS as a staged system)

The rollout below assumes a CESP starting from low maturity. The intent is not to prescribe resources, but to prescribe sequence. Sequence matters: if you open channels before decision rules and case handling, demand will set your strategy for you.

Days 1–30: Control the entry and protect capacity

- Publish the 'one entry point' logic and set expectations (scope, what to prepare, response time).
- Implement intake and triage with a case file (even in a spreadsheet) and assign case ownership.
- Introduce gatekeeping rules and a three-way service path decision.
- Create first three standard outputs: orientation note, structured support action plan, referral bundle.
- Start weekly operating rhythm: backlog review, stuck cases, and learning capture.

Days 31–60: Standardise delivery and activate partners safely

- Define 3–5 repeatable service packages aligned with readiness levels (light, medium, deep).
- Set expert activation rules and use briefing/output templates.
- Build the knowledge base skeleton: FAQs, templates, and decision rules repository.
- Introduce basic monitoring: inflow, triage outcomes, time to decision, and case duration.
- Add a simple quality check: peer review of a small sample of cases each week.

Days 61–90: Stabilise and prepare for scaling

- Refine decision rules based on data: adjust scope, thresholds, and queue caps.
- Formalise partner interfaces where helpful (contact points, response time expectations, feedback loop).
- Expand knowledge base with the top 10 blockers and 'what to do when' notes.
- Introduce a monthly learning review: patterns, policy insights, and improvements to packages.
- Define scaling rules: what triggers hiring, what triggers waiting lists, and what triggers narrowing scope.

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Weekly operating rhythm (the smallest repeatable routine)

To keep MVOS alive, the CESP needs a predictable routine. This routine is intentionally lightweight and works in low-maturity markets. It is less about meetings and more about ensuring that decisions are taken, cases move, and the knowledge base evolves.

Each cadence should produce a tangible output: an updated case backlog, a short list of decisions and escalations, and one small improvement to either decision rules, templates or the knowledge base. This is how early-stage CESPs build maturity without heavy structures.

A practical rule: treat the weekly routine as a service 'control room' where you check queue health, unblock cases and protect staff time. Treat the monthly routine as a learning checkpoint where you update packages and communicate system-level blockers to relevant stakeholders.

- Weekly (30–45 min): case backlog review, stuck cases, queue health, and decisions that need escalation. Output: updated next actions and owners.
- Weekly (15 min): peer review of 2–3 cases to ensure consistency and clarity of outputs. Output: notes on what to improve in templates.
- Monthly (45–60 min): learning review, top blockers, updates to knowledge base and decision rules. Output: a short change log.
- Quarterly (60–90 min): package refresh, partner check-in, and service scope recalibration. Output: updated service packages and thresholds.

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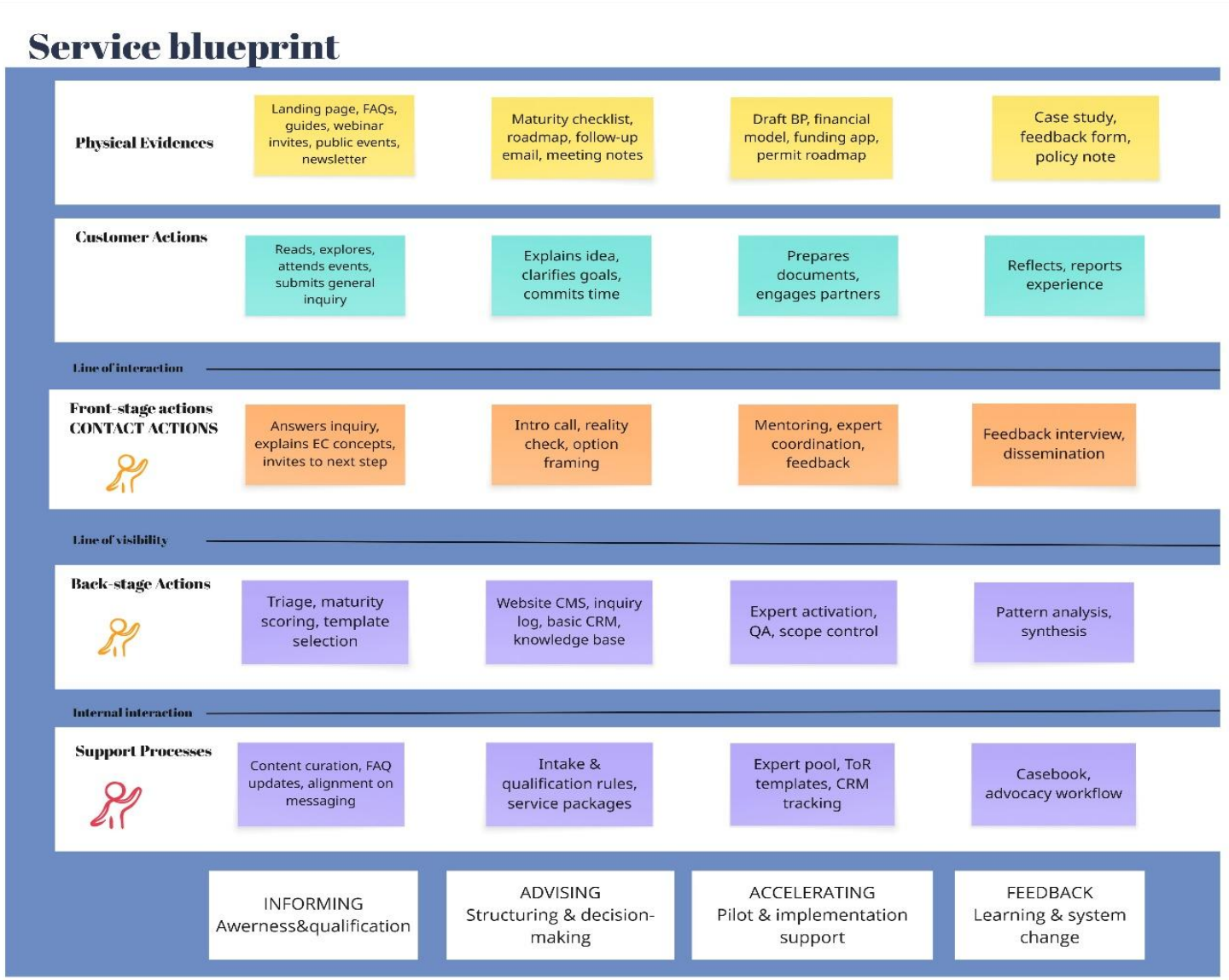
8. Annex 1 CESP Service blueprint



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