



User-Centred
Energy Systems

Users TCP Behavioural Insights Platform

Phase 2 workplan

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Motivation and objective

This document sets out the work plan of the Energy Sector Behavioural Insights Platform and Task Participant contributions for the period of 2021 - 2022 (Phase 2).

The Energy Sector Behavioural Insights Platform brings together government policymakers and other experts to share knowledge and experiences applying behavioural insights to energy policy. The aim of the Platform is to improve the efficacy of demand-side energy policies by ensuring that human behaviour is accounted for throughout the policy cycle. Building on the environment scan developed as part of the first phase, the objective of Phase 2 is to develop resources and activities to help policymakers shift from the sporadic application of behavioural insights to their systematic use in demand-side energy policy.

Deliverables

In Phase 2, the Platform will engage in three strands of activities that will run until the end of 2022. The key deliverables are described below.

1. A toolkit for policymakers

The Platform will produce a toolkit for mid- to top-level policymakers that will help policymakers answer questions such as *Which key behavioural factors influence the adoption of demand-side energy initiatives and why? How can energy policies be designed to help users overcome behavioural barriers? How to best evaluate behaviourally informed policies?* The toolkit will contain checklists, prompts and will be strongly geared towards practical application. The Task Leaders will develop the toolkit in close collaboration with Task Participants, taking their needs, suggestions and particular contexts into account.

2. Learning events & training

The Platform will organise several webinars and training opportunities to disseminate the toolkit among policymakers. Task Participants will have priority access to these events. Some training will be exclusively organised for the Task Participants. These will go more in-depth and provide tailored advice to speed up the adoption of the toolkit within the specific organisation. The Platform will also develop a short massive online course (MOOC) to disseminate the toolkit fast across energy policy teams across the world. Task Participants will be presented as collaborators and partners in all Platform's events and activities.

3. Program and community development

Task Participants will become part of a growing community of behavioural science policy practitioners in the energy domain. The Platform will work on making the community grow further and support the development of its expertise. Building on the links to other associations, the Platform will facilitate networking and collaboration opportunities. The Platform will also develop a strong work program for the upcoming phase, identifying under-explored topics that might be valuable to policymakers. This will inform the activities of the next Task Leaders of the TCP Behavioural Insights Platform.



Time schedule

The table below outlines key activities carried out in Phase 2. The activities are organised into three workstreams:

Workstream	Task	2021			2022			
		Q2	Q3	Q4	Q1	Q2	Q3	Q4
Developing the behavioural insights toolkit	Literature review	■	■					
	Stakeholder interviews	■						
	Toolkit write-up		■	■				
	Obtain feedback and finalise			■				
	Revise and update toolkit						■	■
Outreach activities	Webinars				■	■	■	■
	Conference presentations			■		■	■	■
	MOOC development			■	■	■		
Work programme development	Identify development areas			■	■		■	■
	Prioritise areas with TCP				■			■

Task management

The Task Leaders of Phase 2 of the Behavioural Insights Platform are Jesper Akesson (The Behaviouralist) and Ondrej Kacha (The Behaviouralist). They are responsible for ensuring that the key milestones are met in line with the dates stated in Appendix 1. The majority of the workload will be carried out by the Task Leaders.

Participant contributions

Task Participants are expected to contribute to all activities outlined above, in the form of providing expert commentary and feedback. This can be as part of email communications as well as individual and group meetings organised by the Task Leaders.

The total cost of Phase 2 is €85,000. This sum will cover the costs of operation until the end of 2022. After accounting for the funds that were transferred from Phase 1, there is €65,000 outstanding. Task Participants are expected to pay an equal share of the outstanding sum, which means **a contribution of €10,000 per participating country**.

The TCP Secretariat will invoice Task Participants directly and dispense payments to the Task Leaders in accordance with the completion of the Task milestones outlined in Appendix 1.

Experts from all organisations participating in the Task will be invited to join the Task Steering Group. The purpose of the Task Steering Group is to (1) oversee the quality of produced outputs and approve the payment of operating costs in line with the milestones outlined in Appendix 1, (2) decide about proposed modifications to the scope and deliverables of the Task, and (3) decide whether or not to spend any surplus funds collected in Phase 2 to fund additional activities or whether to carry the funds over into Phase 3 of the

Platform. All participating organisations are expected to have a representative in the Steering Group.

The Steering Group members should delegate at least one member to be the contact point for signing off invoices.

Appendix 1: Project milestones and invoicing schedule of the Task Leaders

The section below outlines the key milestones of this project. The Task Leaders are responsible for producing the outputs detailed in each milestone by the set date. The Steering Group is responsible for determining whether the outputs under each milestone have been delivered to a satisfactory extent.

Once the completion of a milestone is approved by the Steering Group, the Task Leaders are to be paid the sum set for the given milestone to cover their operating costs. If completion of a milestone is deemed unsatisfactory by the Steering Group, the Task Leaders are required to address the concerns raised by the Group until all of these are resolved.

Milestone 1: Project Kick-Off with Task Participants and presentation of draft toolkit outline

Description: The Task Leaders will organise a meeting on which they introduce: (1) a synthesis of the expert feedback on the toolkit obtained as part of individual interviews with at least one expert from every participating country prior to the kick-off, (2) a draft structure of the toolkit that took the expert feedback into account, and (3) proposed next steps to develop and deliver the final version of the toolkit by the end of the year.

Expected time of completion: **August 2021**

Payable fee once milestone completion is approved by the Steering Group: **€15,000**

Milestone 2: Presentation of the final version of the toolkit

Description: The Task Leaders will organise a meeting of the Platform where they will introduce the final version of the toolkit for policymakers. The final version will be preceded by a draft version that will be circulated with Task Participants at least 30 days prior to the meeting. All Task Participants will be given an opportunity to add comments to the draft version. The Task Leaders will incorporate the obtained feedback into the final version of the toolkit that will be presented at the meeting.

Expected time of completion: **December 2021**

Payable fee once milestone completion is approved by the Steering Group : **€25,000**

Milestone 3: Delivery of the content for the MOOC course

Description: The Task Leaders will deliver written and video content (in the form of video presentations, written exercises and collated text resources) that will enable the production of a 5-8 hour Massive Open Online Course (MOOC). The course will be aimed at policymakers and practitioners and will teach how to use the toolkit to develop behaviourally informed demand-side energy programs.



Expected time of completion: **March 2022**

Payable fee once milestone completion is approved by the Steering Group: **€17,500**

Note: The Leaders will ensure the basic production and maintenance of the MOOC (i.e., setting up a platform to host the course, uploading the videos and content to the platform, and maintaining the platform until the end of Phase 2). If additional funds are secured during Phase 2, they can be used towards an advanced production of the MOOC course, subject to the Task Steering Group's Approval. The advanced production might involve setting up a premium course hosting platform, development of interactive course exercises and group exercises to boost engagement, provision of course certificates to users for completing the course, and providing continuous support to learners by a course team.

Milestone 4: Organised four webinars aimed to disseminate the toolkit

Description: The Task Leaders will organise at least four webinars (public or dedicated to the Users TCP member countries, depending on the preferences of the Task Participants). The aim of the webinars will be to introduce the toolkit, obtain feedback on the toolkit from a broader group of policymakers, and work together to identify ways how to best incorporate the toolkit into the daily work of target practitioners.

Expected time of completion: **June 2022**

Payable fee once milestone completion is approved by the Steering Group: **€12,500**

Milestone 5: Delivery of a possible work plan for Phase 3 of the Platform

Description: The Task Leaders will conduct an in-depth literature review and gather input from behavioural science experts working in the domain of energy policy to identify emerging themes in behavioural science and policy. The Task Leaders will organise a meeting for the Task Participants in which they will present: (1) 2-6 key emerging themes in behavioural science and demand-side energy policy as identified based on a literature review conducted by the Task Leaders, (2) a synthesis of the input received from behavioural science experts participating in the Platform (obtained either as part of individual interviews or a survey distributed to experts), (3) a final version of a potential work plan for Phase 3.

The final version of the Phase 3 potential work plan will be preceded by a draft version circulated to the Platform's behavioural science experts at least 14 days prior to the meeting. All Task Participants will be given an opportunity to add comments to the draft version. The Task Leaders will incorporate the obtained feedback into the final version of the potential work plan, which will then be submitted to the Users TCP ExCo ahead of the recruitment of a suitable Task Leader for Phase 3. Ultimately, the Phase 3 Work Plan must be owned by the Task Participants and signed off by the Users TCP ExCo.

The recruitment of the new Task Leader will be done under the coordination of the Users TCP Secretariat, in collaboration with the interested Task Participants. Task Participants are responsible for the content of the Invitation to Tender (ITT), the review of bids and choice of Task Leader. The Users TCP Secretariat will provide a template for the ITT and will send out the ITT and receive bids.

Expected time of completion: **December 2022**

Payable fee once milestone completion is approved by the Steering Group: **€15,000**



Appendix 2: Additional activities in Phase 2

The BI Platform can provide support to other Users TCP Annexes and activities. These include supporting in the design of behavioural experiments, providing feedback to survey drafts, assisting with behavioural data analyses, and providing support in writing research reports and publications.

Additional activities that will require substantial time on behalf of the Task Leaders are subject to additional fees to cover the extra operating costs. The fees will be determined based on the hourly rates of the Task Leaders (available upon request) and shall be payable by the body who has assigned the additional task.