



Local Energy **Oxfordshire**

March 2023 | Version 1

# Barriers and opportunities for stakeholder engagement

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<b>Report Title:</b>	<b>Barriers and opportunities for stakeholder engagement</b>
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<b>Version:</b>	1	<b>Date:</b>	21.02.2023
<b>Workpack:</b>	WP6	<b>Deliverable:</b>	6.1.9
<b>Reviewed by:</b>	Reviewed by Nick Banks and all contributing partners		
<b>Date:</b>	21.02.2023		
<b>Signed off by:</b>	Nick Banks		
<b>Date:</b>	28.02.2023		

<b>Can be shared (Y/N):</b>	Internally	Y	Externally	Y (once reviewed and signed off by partners)
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## Context

The UK Government has legislated to reduce its carbon emissions to net zero by 2050. Meeting this target will require significant decarbonisation and an increased demand upon the electricity network. Traditionally an increase in demand on the network would require network reinforcement. However, technology and the ability to balance demand on the system at different periods provides opportunities for new markets to be created, and new demand to be accommodated through a smarter, secure and more flexible network.

The future energy market offers the opportunity to create a decentralised energy system, supporting local renewable energy sources, and new markets that everyone can benefit from through providing flexibility services. To accommodate this change, Distribution Network Operators (DNOs) are changing to become Distribution System Operators (DSOs).

Project Local Energy Oxfordshire (LEO) is an important step in understanding how new markets can work and improving customer engagement. Project LEO is part funded via the Industrial Strategy Challenge Fund (ISCF) who set up a fund in 2018 of £102.5m for UK industry and research to develop systems that can support the global move to renewable energy called: Prospering From the Energy Revolution (PFER).

Project LEO is one of the most ambitious, wide-ranging, innovative, and holistic smart grid trials ever conducted in the UK. LEO will improve our understanding of how opportunities can be maximised and unlocked from the transition to a smarter, flexible electricity system and how households, businesses and communities can realise the benefits. The increase in small-scale renewables and low-carbon technologies is creating opportunities for consumers to generate and sell electricity, store electricity using batteries, and even for electric vehicles (EVs) to alleviate demand on the electricity system. To ensure the benefits of this are realised, Distribution Network Operators (DNO) like Scottish and Southern Electricity Networks (SSEN) are becoming Distribution System Operators (DSO).

Project LEO seeks to create the conditions that replicate the electricity system of the future to better understand these relationships and grow an evidence base that can inform how we manage the transition to a smarter electricity system. It will inform how DSOs function in the future, show how markets can be unlocked and supported, create new investment models for community engagement, and support the development of a skilled community positioned to thrive and benefit from a smarter, responsive and flexible electricity network.

Project LEO brings together an exceptional group of stakeholders as Partners to deliver a common goal of creating a sustainable local energy system. This partnership represents the entire energy value chain in a compact and focused consortium and is further enhanced through global leading energy systems research brought by the University of Oxford and Oxford Brookes University consolidating multiple data sources and analysis tools to deliver a model for future local energy system mapping across all energy vectors.

## Executive summary

Project LEO has produced a series of Barriers and Opportunities Reports throughout the project. This short report focusses on barriers and opportunities to stakeholder engagement within Project LEO. It is based interviews with project partners on this topic, together with information synthesised from other reports.

### Audiences and purposes of stakeholder engagement within Project LEO

Interviewees described engaging with diverse stakeholders for multiple purposes. Stakeholders included households; community groups (with and without a specific focus on energy); organisations and businesses; Local Authorities; investors; regulators and policy makers; energy industry specialists; academics; and other partners involved in Project LEO itself. Purposes of stakeholder engagement included:

- Recruiting and supporting participation in trials
- Crowdsourcing information and co-creating plans
- Informing stakeholders about flexibility and SLES
- Inviting feedback on expectations for industry development
- Learning from others' experiences in the area of SLES and flexibility
- Sharing project learning
- Seeking feedback on processes of engagement
- Ensuring regulatory compliance

### Barriers and opportunities for stakeholder engagement

Based on thematic analysis of interviews, barriers and opportunities to stakeholder engagement were identified under ten high level themes, many of which cut across the stakeholder types and engagement purposes outlined above.

#### 1. Understanding and knowledge of flexibility

Both households and organisations frequently have low awareness and understanding of flexibility. This can impact on decisions to enrol and understanding of how to participate. Opportunities are presented by strategies to simplify communication and provide different levels of engagement to suit different stakeholders' interests or needs. Growing national awareness of demand side flexibility also offers an opportunity going forwards.

#### 2. Medium of communication

Relying on English language and written and online communications can mean that engagement is not accessible to all stakeholders. This can be addressed through providing translation where appropriate, and face-to-face communication, which can also have further benefits.

#### 3. Relevance and alignment with stakeholders' existing priorities and concerns

Stakeholders including households and organisations may perceive flexibility as potentially risky and of lower priority than other concerns. However, there is an opportunity for effective engagement to communicate how participating in flexibility provision can help to address stakeholders' particular concerns, including Net Zero targets, supporting the local community, or receiving financial rewards.

Engagement approaches can also be misaligned with stakeholders' priorities and concerns, for example if engagement is attempted in times and places when stakeholders are otherwise occupied, or unappealing incentives are offered. This can be addressed through evaluating and adapting the approach.

#### **4. Engaging through key organisations and individuals**

Stakeholder engagement can be facilitated by drawing on the reputation, expertise and networks of intermediary organisations with existing trusted relationships with stakeholders (such as community groups) or the enthusiasm and efforts of individuals who champion flexibility within organisations. However, it should be recognised that engaging via specific groups will likely not reach all relevant stakeholders, and that champions may have limited ability to effect organisational change.

#### **5. Recognising stakeholders' efforts**

Engagement can be supported if stakeholders are able to gain something of value to them, including but not limited to useful information. Engagement in co-creation also benefits from explicitly recognising and communicating how the insight of stakeholders such as households and community groups are uniquely valuable and can complement more technical 'expert' knowledge. Conversely, stakeholders may deprioritise action on flexibility or smart local energy systems if they feel the effort they are making is not adequately recognised.

#### **6. Spatially concentrated engagement**

Developing smart local energy systems and local flexibility involves engaging stakeholders, such as flexibility providers, in defined local areas. This presents opportunities including enhancing the potential to build new trusted relationships by meeting with stakeholders, or draw on the existing trusted relationships of organisations such as local community groups. However, offering different opportunities to different local areas has the potential to be perceived as unfair, and may also increase the total resource required for engagement activities, particularly if different areas are engaged with at different times.

#### **7. Financial and technical challenges to participation**

Stakeholders including households may find the up-front costs of some new low-carbon technologies act as a barrier to participating in some smart local energy system offers, even if they are otherwise highly motivated. Organisations may be concerned that their existing assets are not suitable for flexibility provision, and face high transaction costs and low and uncertain revenues if they do participate.

#### **8. Engaging up to and beyond technology installation, trial enrolment or the uptake of new tools**

Engagement should not stop at the point when stakeholders decide to take action. Training users and providing ongoing support can improve the use of new technologies and tools, and learning from users' experiences and feedback can also help to inform the design of smart local energy system offers. However, it can be challenging to access the resources to support this kind of ongoing engagement. It may require new roles and/or upskilling of existing roles, such as technology installers, together with appropriate resourcing.

## **9. Learning from experiences of stakeholder engagement**

Evaluating engagement strategies based on experience, and adapting where necessary can greatly improve success. However, it can sometimes be difficult to assess the usefulness of stakeholder engagement, or reasons not to engage.

## **10. Project frameworks for stakeholder engagement**

Features of project frameworks for stakeholder engagement can also represent barriers and opportunities (or potentially both, depending on how they are managed). Opportunities included consortium partnerships providing a range of voices and skills to support stakeholder engagement, and explicit frameworks to seek feedback on engagement activities and support evaluation and learning. Challenges include time constraints for stakeholder engagement, as well as an initial lack of clarity around households' ineligibility to access innovation funding to install new technologies as part of trials.

As LEO is an innovation project, stakeholder engagement was often initiated before trial concepts were fully developed. This could be managed to reduce barriers (stakeholders lacking clarity around what was involved) and enhance opportunities (stakeholders providing input to develop offers). Similarly, relatively open roles and responsibilities for different partners to undertake stakeholder engagement could represent a barrier through lack of clarity, or an opportunity as roles and responsibilities can be agreed based on ongoing experiences and learning.

## **Recommendations**

Looking across these barriers and opportunities suggests a number of recommendations to support stakeholder engagement:

- 1. Work to understand stakeholders' processes, priorities, concerns and needs**
- 2. Work with and nurture trusted relationships**
- 3. Recognise, value and make use of stakeholders' input**
- 4. Plan to evaluate, learn and adapt engagement approaches where needed**
- 5. Provide sufficient time and resources for engagement, for all parties and at different times**
- 6. Ensure engagement activities follow ethical principles**

These are elaborated in Section 3 of the report.

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## 1 Introduction

Project LEO has produced a series of Barriers and Opportunities reports throughout the project. This short report focusses on barriers and opportunities to stakeholder engagement as part of the project.

Project LEO applied the following definition of stakeholder engagement:

“Stakeholder engagement is the process used by an organisation to engage relevant stakeholders for a clear purpose to achieve agreed outcomes.”<sup>1</sup>

This report presents findings from interviews with project partners on barriers and opportunities to stakeholder engagement within Project LEO. Interviews were conducted in the final months of the project. Different project partners described engaging with a range of stakeholders for different purposes. These included:

### *Households:*

- To recruit to trials conducted as part of the project.
- To seek feedback on experiences of participating in trials.
- To educate about how their actions as part of trials contribute to support decarbonisation in the wider energy system.
- To gather local information via the survey function of the LEMAP (Local Area Energy Mapping) tool developed for the project.

### *Community groups with a focus on energy and sustainability:*

- To co-create plans for smart local energy system development in their local area.
- To help connect with and recruit households to trials and LEMAP survey completion.

### *Community groups with a non-energy focus, local councillors and newsletters:*

- To help connect with and recruit households to trials and LEMAP survey completion.

### *University Estates teams, Local Authorities and other organisations and businesses recruited as trial participants:*

- To recruit to trials
- To help prepare for participation in trials, for example signing contracts and assessing and increasing assets' flex readiness.

### *Local Authorities outside of the project:*

- To understand the concept and relevance of flexibility to Local Authorities and disseminate relevant learning from LEO.
- To seek views on the future development of smart local energy systems.

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<sup>1</sup> This definition, and high-level principles for stakeholder engagement, were laid out in the 'Stakeholder Engagement Principles' strategic document, which can be accessed here: <https://project-leo.co.uk/reports/project-leo-stakeholder-engagement-principles/>

*Investors and hosts of solar PV installations involved in trials:*

- In the process of installing new PV to participate in trials. Hosts of rooftop solar PV installations included schools and business, and small and large investors in PV installations including the Ray Valley solar park were also engaged with.

*Regulators:*

- To establish regulatory conditions for conducting some trials (for example, the Environment Agency consented to vary flows of water through Sandford Hydro plant as part of trials).
- To share learning from LEO with Ofgem, for example on the potential wider application of LEMAP for Local Area Energy Planning.

*Policy makers:*

- To disseminate learning from LEO
- To seek views on the future development of smart local energy systems.

*Stakeholders involved in other PFER funded projects, and other 'special interest' stakeholders working in flexible energy, energy innovation, and with Distribution System Operators (DSOs):*

- To disseminate learnings from LEO and contribute to lead wider industry change
- To compare experiences to learn what is common across the industry
- To increase the value of learnings from LEO by generating opportunities to situate or synthesise them with related learnings from other contexts.

*Academics outside of Project LEO:*

- To disseminate learnings from LEO and create an avenue for their wider exploitation.
- To increase the value of learnings from LEO by generating opportunities to situate or synthesise them with related learnings from other contexts.

*Partners involved in Project LEO:*

- To coordinate activities, including negotiating priorities of different partners, and discussing and agreeing the distribution of roles and responsibilities when engaging with external stakeholders.
- To learn about partners' experiences and insights and synthesise findings.
- To present analysis of data conducted during the project to inform ongoing activities.

The following section presents findings on barriers and opportunities to stakeholder engagement grouped under a number of themes that emerged from the interviews, and which in many cases apply to engagement with multiple stakeholder types. The themes consider barriers and opportunities alongside one another. The report concludes by presenting recommendations derived by looking across these themes.

## 2 Barriers and opportunities for stakeholder engagement

This section presents barriers and opportunities to stakeholder engagement under a number of high-level themes, many of which cut across the stakeholder types and engagement purposes outlined in Section 1:

1. Understanding and knowledge of flexibility
2. Medium of communication
3. Relevance and alignment with stakeholders' existing priorities and concerns
4. Engaging through relationships with key organisations and individuals
5. Recognising stakeholders' efforts
6. Spatially concentrated engagement
7. Financial and technical challenges to participation
8. Engaging up to and beyond technology installation, trial enrolment or the uptake of new tools
9. Learning from experiences of stakeholder engagement
10. Project frameworks for stakeholder engagement

### 2.1 Understanding and knowledge of flexibility

#### 2.1.1 Barrier: Lacking understanding and knowledge may impact on decisions to enrol and understanding of how to participate

Many of the stakeholders engaged during Project LEO did not have specialist knowledge about smart local energy systems or demand side flexibility. Understanding of flexibility may be required for stakeholders to *decide to participate*. They may need this knowledge to understand the potential benefits of participation, including non-financial benefits such as supporting the connection of more low carbon technologies to the local network, which may also act as motivations for participation. Understanding the concept of flexibility may also be important for potential participants to understand why financial rewards can even be offered for flexibility, and to understand that this offer is not 'too good to be true':

I feel like the reason that people think it's too good to be true is because they don't understand about DSR [demand side response], so they don't see where the value comes from – why they would be rewarded financially for doing these things.

(Project Partner at Equiwatt)

Understanding and knowledge is also needed to *inform actions required to participate in flexibility*, including quantifying flex potential of assets, understanding how this can be improved and deployed in flexibility markets, and reviewing legal contracts.<sup>2</sup> Households may have misconceptions about how much different actions will contribute to achieve flexibility<sup>3</sup> or energy efficiency<sup>4</sup>, meaning their efforts may not give the results they expect.

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<sup>2</sup> These barriers have been discussed in a number of publications produced during Project LEO, including Barriers and Opportunities reports on [trial recruitment](#) and [implementing trials](#), and the evaluation reports for [Trial Period 1](#) and [Trial Period 2](#).

<sup>3</sup> Parrish, B. et al. (2020) 'A systematic review of motivations, enablers and barriers for consumer engagement with residential demand response', Energy Policy. 138(111221) doi: 10.1016/j.enpol.2019.111221.

<sup>4</sup> Provision of a practical and scalable engagement plant to support retrofitting with energy flexibility in Rose Hill, Oxford Summary Report. Bioregional and Transition by Design, 2023.

### 2.1.2 Opportunity: Simplifying communication

Project Partners within LEO addressed this barrier by purposefully *simplifying language* and using *familiar concepts* to communicate with stakeholders about flexibility. For example, one project partner explained how referring to the LEO market platforms using the familiar concept of procurement platforms, rather than unfamiliar flexibility markets, transformed the understanding and buy-in of internal stakeholders within their organisation. Partners also produced glossaries of key terms and animations, which were found to be useful to help explain the concept of flexibility<sup>5</sup>.

*Feedback from stakeholders* can be very useful to gain insight into which features of communication are difficult to understand and how these should be changed:

The community group was central to [...] removing the technical jargon from the tool. Which we struggled with; we don't we don't know how to present information without graphs. They wanted us, for example, not to say heating season and non-heating season, but to say what it meant [...] or, you don't say ventilating a house, you say airing a house. I really value their input.

(Project Partner at Oxford Brookes University)

There may be limitations to how far information can be simplified. For example, there may be a point at which legal contracts cannot be simplified further without losing their specific meaning. Some project partners communicated demand side response in terms of reducing or increasing electricity use as specific times, rather than demand shifting, or changing the timing of electricity demand. Although the concepts of increasing/decreasing are easier to understand, this may mean that any misunderstanding or mistrust of the offer is less effectively overcome. It could also contribute to an overall increase in electricity demand:

I think if the incentives are right, then you don't need to understand. I think it would be highly useful for people to understand though, because I think it would reduce the risk of people just, for example, using more [electricity, rather than changing the time at which electricity is used].

(Project Partner at Low Carbon Hub)

Some interviewees also reflected that the complexity of Project LEO itself makes it difficult to crystallise clear messages that can influence wider industry change without losing some of the richness of learning that has been generated. This reflects the socio-technical nature of flexibility and smart local energy systems: they involve diverse technical, economic and social aspects, each of which may be complex in themselves, and which are also interrelated.

### 2.1.3 Opportunity: Making engagement flexible for differing levels of interest or needs

Some partners provide different levels of information and engagement, recognising that different stakeholders may have different interests or needs for information. This included providing different levels of information so that stakeholders could learn more if they wished, enabling households participating in demand side response to set their preferred level of communication from aggregators, and being willing to respond to email queries from households who are particularly interested or engaged.

### 2.1.4 Opportunity: Growing awareness of demand side flexibility

Interviewees identified National Grid's Demand Flexibility Service as likely to raise awareness and understanding of demand side flexibility nationally, and the potential for this to facilitate future

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<sup>5</sup> Animations, glossaries and similar resources for engagement can be accessed here: <https://project-leo.co.uk/blog/making-the-language-of-smart-flexible-energy-systems-easier-to-understand/>

engagement with DSO-procured local demand-side flexibility as well as flexibility procured by the ESO at national level. More proactively, Project Partners at Equiwatt engaged with national and local media to raise awareness of how their service could be used to participate in National Grid's Demand Flexibility Service as well as demand response events implemented within Project LEO.

Project LEO itself has contributed to develop wider understanding of local demand-side flexibility through sharing learnings with a wide range of interested stakeholders.

## 2.2 Medium of communication

### 2.2.1 Barrier: Relying on English can mean communications are not understood

Communicating in simple language can be even more important when English is not someone's first language, a consideration which has been particularly relevant in Project LEO as Oxford is a highly multicultural city<sup>6</sup>. Project Partners at Low Carbon Hub explained that in certain cases stakeholders with English as an additional language found it difficult to understand information about trials, even though this was presented in simple everyday language. This highlights the importance of being aware of languages spoken by stakeholders and providing translations where appropriate. This will also require additional resources to be made available for stakeholder engagement, particularly where translation is provided for face-to-face as well as written engagement.

### 2.2.2 Barrier: Some stakeholders may find it difficult to access written and digital communications

In addition to face-to-face engagement activities conducted as part of the project, Project LEO has produced a wealth of online resources, which it is hoped will continue to engage stakeholders in flexibility provision and smart local energy systems after the project's end. However, some interviewees highlighted that these resources may not be accessible to stakeholders:

It doesn't, for example, speak to people who can't use websites, or who have literacy issues or who don't understand energy flexibility, or who live in smaller rural communities with poor [internet] signal.

(Project Partner at SSEN)

## 2.3 Relevance and alignment with stakeholders' existing priorities and concerns

### 2.3.1 Barrier: Flexibility may be perceived as low priority and potentially risky

Interviewees suggested that a range of stakeholder types might be deterred from participating in flexibility if it is seen as low priority compared to other priorities and concerns. In particular, managing the impact of high energy prices was perceived as a more pressing short-term issue for organisations to address, and high bills may also have deterred households from switching tariffs or energy suppliers (which was required for some trials). Organisations and households may also see participating in demand side flexibility as potentially risky, including perception of risk to maintaining service levels while participating in flexibility provision<sup>7</sup> and the risk of investing in flexibility provision while the business case remains uncertain:

It's challenging when [stakeholders] have to know there's a viable market for this before [they] can invest in staffing. So [they're] almost taking a leap of faith that this is something that's worth investing in and investigating and giving staff that time and resource to do.

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<sup>6</sup> Provision of a practical and scalable engagement plan to support retrofitting with energy flexibility in Rose Hill, Oxford Summary Report. Bioregional and Transition by Design, London and Oxford, 2023

<sup>7</sup> [Project LEO and Transition Market Trials report \(Period 1\). Multiple Authors. 2022](#)

(Project Partner at SSEN)

Similarly, households may be concerned about impacts on living environments in the home<sup>8</sup> and potentially financial risks if flexibility involves time-varying electricity pricing<sup>9</sup>.

### 2.3.2 Barrier: Conducting engagement activities at unhelpful times and places

Interviewees described finding particular times and places unhelpful for conducting household engagement, as households have different priorities at these times. This included recruitment stalls in the period before Christmas, when people were perceived to be mostly focussed on Christmas shopping, and door-to-door information gathering surveys:

When they started to do [door to door surveying] they found that people were busy in their everyday lives. And because the tool requires you to have EPC data [...] if you do door to door, people are not going to have that to hand.

(Project Partner at Oxford Brookes University)

### 2.3.3 Barrier: Unappealing sign-up incentives and engagement associations

Free broadband was offered as an incentive for households to participate in a flexibility trial run in two new blocks of flats. However, this was found to be largely irrelevant and consequently ineffective as an incentive, as households had typically set up broadband contracts before moving into their new homes and learning about the trial.

Engagement can also be hindered if households associate elements of engagement activities with unappealing meanings; for example, engagement stalls that look too professional may be associated with salespeople.

### 2.3.4 Opportunity: Communicating how flexibility and mapping tools can help to address existing priorities and concerns

Interviewees did describe multiple opportunities to align flexibility provision with stakeholders' existing priorities and concerns. This included opportunities for participation to contribute to address the University of Oxford's Sustainability Strategy, and Local Authority net zero goals in the form of ZCOP (Zero Carbon Oxford Partnership). It was also reported that community energy groups were particularly willing to engage with LEMAP (Local Area Energy Mapping), a tool developed within LEO, because using the tool to crowd-source data from local residents also supported them in achieving their own objectives of increasing local engagement in energy and environmental issues.

Participating in flexibility provision and SLES has the potential to provide various environmental and social as well as financial benefits. Making this count in engagement requires those doing the engagement to have sufficient knowledge of stakeholders' existing priorities and concerns, and the ability to communicate – at an appropriate level of technical detail – how participation in flexibility provision and SLES can contribute to address these.

Of course, this opportunity also depends on wider changes, such as the growth of Net Zero targets, that influence stakeholders' priorities and concerns, but partners involved in stakeholder engagement can help to draw further attention to these. For example, Project Partners at Oxford City Council described drawing attention to a national news article that suggested distribution

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<sup>8</sup> Provision of a practical and scalable engagement plant to support retrofitting with energy flexibility in Rose Hill, Oxford Summary Report. Bioregional and Transition by Design, London and Oxford, 2023

<sup>9</sup> Parrish, B. et al. (2020) 'A systematic review of motivations, enablers and barriers for consumer engagement with residential demand response', Energy Policy. 138(111221) doi: 10.1016/j.enpol.2019.111221.

network constraints could start to impact on the development of new social housing in London, as a way to enhance the salience of flexibility to Council planning teams:

That's the kind of information that comes out in the media that suddenly makes local authorities sit up and go, "Oh, yes, grid constraints, flexibility, these are really important, and we need to be thinking about them more".

(Project Partner at Oxford City Council)

**2.3.5 Opportunity: Finding or creating times and spaces for more effective engagement**  
Face-to-face engagement can be a valuable way of raising awareness, and can be more effectively implemented in spaces that are more appropriate for considered conversation. For example, project partners at Equiwatt described shifting face-to-face engagement activities away from busy, high footfall locations such as shopping areas to quieter, calmer locations such as libraries improved customer interest and engagement. Other interviewees reported much greater success in engaging households in survey completion at dedicated community events rather than going door-to-door:

"If they come to a community event, and they know that this kind of survey might happen, they come prepared a bit [...] most of the completion happened as a result of community events."

(Project Partner at Oxford Brookes University)

**2.3.6 Opportunity: Applying tools such as stakeholder mapping and the value proposition 'canvas'**

Profiling stakeholders was an explicit principle of stakeholder engagement in Project LEO<sup>10</sup>. To support this, work within the project drew on a number of approaches and tools designed to support stakeholder engagement. Stakeholder mapping was undertaken at the start of the project to identify the range of relevant stakeholders and their relationships as an initial input into designing engagement strategies; an example is shown in Figure 1. Stakeholder mapping exercises may be particularly important given the complexity of SLES and the associated range of stakeholders involved. Tools to develop value propositions have been applied as a structured way to think through users' priorities and concerns. This has helped to tailor the design of SLES service offers to better align with different groups of users' needs and capabilities, with the aim of making service offers more appealing, accessible and fair<sup>11</sup>.

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<sup>10</sup> [LEO Stakeholder Engagement Principles Ruth Harris and Nick Banks. 2020, Oxford, UK](#)

<sup>11</sup> [Value Propositions in a Smart Local Energy System. Nick Banks, Oxford, 2022.](#)



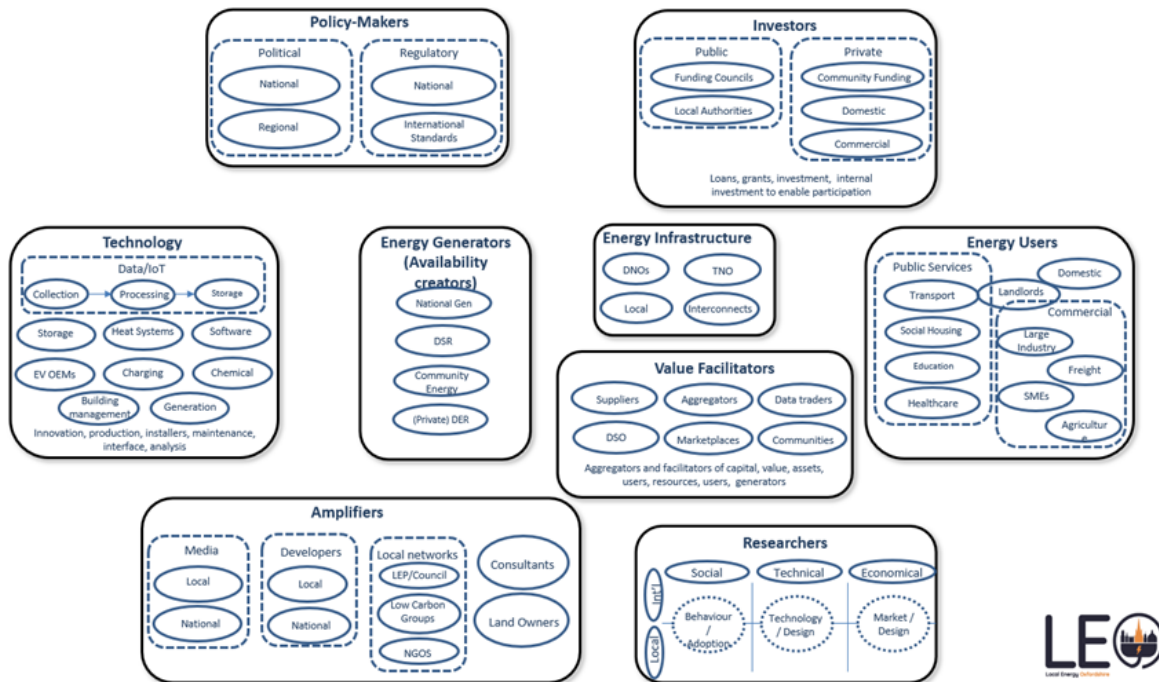


Figure 1: Stakeholder roles and value creation within the LEO Ecosystem. Reproduced from the LEO first year synthesis report<sup>12</sup>

## 2.4 Engaging through key individuals and organisations

2.4.1 Opportunity: Engaging via actors with existing trusted relationships with stakeholders  
 Experiences of developing Smart and Fair Neighbourhoods within Project LEO reiterate the value of partnering with actors with existing trusted relationships when engaging with stakeholders. For example, working with established community groups helped Project Partners at Equiwatt to spread the word about their domestic demand side response offer:

Talking to a number of the active community groups that are out there in Oxfordshire [we formed] some really successful partnerships with a few of them [...] if we can get out and about in the community, there's some real appetite for what we're doing. This great support brings credibility and trust on a local level.

(Project Partner at Equiwatt)

This strategy also enabled mutual value to be gained by aligning with stakeholders' existing priorities and concerns:

Finding active groups that had synergies with our own values meant that there was heightened interest in sharing within their closed community, where they could experience and build trust in the service directly, before recommending onwards to their broader communities through events.

(Project Partner at Equiwatt)

### 2.4.2 Opportunity: Working with social capital in a community

This can also be helpfully understood in terms of social capital, with intermediary organisations potentially able to increase communities' 'linking' social capital, which describes communities' ability

<sup>12</sup> [First Year Synthesis Report. Sarah Darby and Nick Banks, Oxford, 2020.](#)

to access external sources of expertise, funding and other resources, and ‘bridging’ social capital, which refers to relationships between different groups within communities that support the sharing of ideas. These forms of social capital can have an important influence on communities’ ability to participate in SLES<sup>13</sup>. It may also be possible for SLES projects to invest in further developing linking social capital, for example by working with local communities to develop knowledge, skills and confidence required to access external resources<sup>14</sup>.

#### 2.4.3 Opportunity: Engaging via individuals who champion an idea

Individuals who champion an idea such as flexibility can also offer an opportunity to engage with their wider organisation or community. One example was an individual within the University of Oxford Estates Team, who took a particular interest in the project, and helped to facilitate access to different groups even before organisational buy-in became more established. Interviewees explained that it may be possible to cultivate relationships with such individuals even within the period of stakeholder engagement, for example by spending time being present in a community, becoming familiar and getting to know some of its members. This may make this opportunity applicable outside of contexts with established actors such as community groups.

#### 2.4.4 Barrier: Engaging via specific groups may exclude certain stakeholders

Although engagement can be facilitated by working with actors with existing trusted relationships, there is a risk that this approach excludes people who may not engage with this group or its members. Project Partners described different steps taken to address this, including engaging via multiple community groups (including groups such as youth clubs and football clubs as well as those with an explicit focus on sustainability), the local school, and local newsletters, with the aim of making engagement as inclusive as possible.

#### 2.4.5 Barrier: Champions may find it difficult to effect organisational change

Some interviewees pointed out that despite individuals in organisations holding expertise and enthusiasm for flexibility, they may struggle to translate this into wider organisational change:

It was a member of their staff, who [...] seemed to be really passionate about it. But they either didn't have the organisational buy-in or the expertise in other areas of the business to make that possible.

(Project Partner at SSEN)

This participant was eventually recruited to trials, which suggests the ‘champion’ may have had some impact on engagement. However, at least within this relatively large organisational participant, trial recruitment involved assigning a team of staff specific roles to support participation in the project.

## 2.5 Recognising stakeholders’ efforts

### 2.5.1 Opportunity: Supporting a sense of ownership and reciprocity can help engagement with households and communities

Supporting a sense of ownership can be particularly important in co-creation work – involving households or communities working together with ‘experts’ – as it provides reassurance that their insights and inputs are important and valuable. Examples included listening and responding to community groups’ understandings and priorities through engaging in consensus-based co-creation

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<sup>13</sup> [Creating Superpowers: Capable Communities in Smart Local Energy Systems](#). Paper presented at the European Council for an Energy Efficient Economy conference on the topic of “community Level Capabilities in smart local energy systems”. Nick Banks, 2022.

<sup>14</sup> [Value Propositions in a Smart Local Energy System](#). Nick Banks, 2022.

processes, and presenting households with available technical information on their homes for them to amend and correct. Similarly, engagement can be supported if stakeholders feel their efforts are reciprocated through gaining something as part of the exchange. For example, interviewees described how households appeared more motivated to complete the LEMAP (Local Area Energy Mapping tool) survey because they would gain immediate information about their own home together with expert help to interpret it<sup>15</sup>.

### 2.5.2 Barrier: Not recognising stakeholders' efforts can hinder engagement

Project Partners at the University of Oxford described how the Estates Team's motivation to participate in flexibility trials wavered early in the project because they perceived their contribution, in the form of staff time and effort to understand and improve the flexibility potential of their assets and payment for an external lawyer to review the contract for flexibility delivery. This led to a perception that the DNO were overly impatient for the contract to be signed, and completing this process was deprioritised.

## 2.6 Spatially concentrated engagement

### 2.6.1 Opportunity: Focussing recruitment in local areas can increase opportunities to build relationships and draw on existing trusted relationships

The opportunities Project Partners described around engaging through relationships with key individuals and organisations are likely to be easier to achieve – or sometimes only possible to achieve – when engagement is spatially concentrated. For example, focussing engagement in a local area will make it easier to identify and communicate with established local groups who may be able to aid engagement activities, while partners involved in stakeholder engagement may need to spend time present in a local area or community in order to build new relationships as part of the engagement process.

### 2.6.2 Barrier: Perceived unfairness and diluting resources for engagement

Project LEO sometimes included examples of highly spatially concentrated engagement, for example recruiting residents of a specific block of flats, or homes connected to specific parts of the distribution network. This is likely to be common across DSO-procured flexibility services, which need to address constraints within specific parts of the distribution network. Some Project Partners reported challenges associated with engaging households in such specific areas. For example, giving different treatment to households who are near neighbours could raise issues around (perceived) fairness:

If you give out incentives for a particular postcode, what do you do for the rest of the postcodes? If they are left out, then how can they be kept engaged?

(Project Partner at Equiwatt)

Highly spatially concentrated recruitment was also expected to increase the overall resource required for engagement, not only because recruiting sufficient concentrations of participants to contribute to distribution network management may require relatively intensive forms of engagement, but also because engagement activities are likely to also reach households outside of the target area, with the effect of 'diluting' engagement. In addition, it was expected that multiple waves of engagement may need to be undertaken to recruit new participants if new network constraints arise. Project Partners at Equiwatt suggested it may be useful to recruit households more

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<sup>15</sup> See LEO 4<sup>th</sup> Annual Interviews Report, Section on Co-Creation

widely so they are available to respond if and when local constraints arise, and could also provide ESO-procured flexibility if frameworks for value stacking become established.

Another approach could be to design stakeholder engagement strategies that seek to maximise the potential benefits of working with trusted local actors and social networks in particular local areas.

## 2.7 Financial and technical challenges to participation

### 2.7.1 Barrier: Upfront costs can prohibit households' installation of some low carbon technologies

Project Partners Low Carbon Hub emphasised that in some cases government support is not sufficient to enable households to install new low carbon technologies, and that this can act as a barrier to engagement even when households are otherwise highly motivated:

We've had no shortage of people wanting to get involved [...] It's often been the technical or the financial challenges that have made it harder.

(Project Partner at Low Carbon Hub)

This was particularly the case in a trial seeking to install heat pumps in an area of primarily older homes, which recommended retrofit measures to improve building fabric efficiency, or correspondingly larger and more expensive heat pumps to be installed. Interestingly, this barrier was also present in an area where many residents were seen as relatively comfortable financially, where the barrier of high capital outlay, combined with the need to embrace a new technology and low availability of contractors compounded the issue.

### 2.7.2 Barrier: Concerns that there may be technical challenges to participation

As described in the report on barriers and opportunities to trial recruitment, organisations may be concerned about their assets' technical suitability to participate in flexibility provision. Concerns included incompatible equipment, timings for flexibility services not aligning with asset use, and meeting requirements for communications and metering<sup>16</sup>.

### 2.7.3 Barrier: High transaction costs and low and uncertain revenues for flexibility provision

Transaction costs can be associated with investments to make assets flex ready – for example, updating communication and management systems – and staff time required to operate assets and participate in the auctions that were trialled as part of the local flexibility market demonstrated in LEO. At the end of the project, participants have reported that such transaction costs remain relatively high and may not be justified by the relatively low and uncertain revenues available for local flexibility provision. These issues, and the potential for transaction costs to reduce and revenues to increase are discussed in detail in LEO's fourth annual interviews report.<sup>17</sup>

## 2.8 Engaging up to and beyond technology installation, trial enrolment or the uptake of new tools

### 2.8.1 Opportunity: Ongoing engagement can improve outcomes for users and the energy system

Interviewees' accounts suggest that, often, engagement would ideally continue past the point when stakeholders decide to install new technologies, enrol in trials or start using new tools. Ongoing engagement can be important to mediate flexibility provision, for example by providing participants

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<sup>16</sup> [Barriers and Opportunities: Market Trials Recruitment. Ruth Harris, Oxford, 2021](#)

<sup>17</sup> See Project 4th Annual Interviews Report.

with notifications, and to reassure or answer questions about automated flexibility that may be noticed by users such as changing timing or electric vehicle charging.

Further engagement can also include training or educating users as part of the handover of new tools or technologies, as well as ongoing engagement to support their effective use. Work on supporting engagement with home efficiency retrofit together with flexibility highlighted the importance of educating and training household members on new technologies as part of improving their experiences of installation and their use of new technologies. Similarly, training responsible officers within Local Authorities in the skills they need to use LEMAP (the Local Area Energy Mapping tool) and providing ongoing support was also identified as important to help users to get the most out of the tool and avoid it being misapplied or misunderstood. Feedback sessions with participants involved in the Solar Savers Trial<sup>18</sup> was expected to help participants to understand the contribution of their actions to supporting wider energy system change. By providing individual feedback on the timing of electricity use, it could also help participants to see how effectively they were demand shifting and potentially provide support such as advice on how this could be improved.

Providing opportunities for ongoing support can be particularly important if users do not remember all the information initially provided to them, or if their experiences change over time so that new forms of support become relevant. For example, experiences of heat pumps may change with changing weather conditions, while experiences of flexibility provision may change due to the dynamic nature of these services:

They all did a separate onboarding, so when they signed up, we explained what's going to happen. But the services within LEO change, and so we tried to also offer an update.

(Project Partner at Nuvve)

### 2.8.2 Opportunity: Learning from users can help to improve the design of smart local energy system offers

Project Partners at Oxfordshire County Council observed how, through applying a strategic energy mapping tool to address problems, users within the council could identify creative new ways to use the tool:

We, in developing or writing the specifications, or project managing this mapping project, have not identified as many opportunities as users who've come back with suggestions, when they see *their* data that's most relevant to their specific bit of work, and then are both able to enhance our tool, but also find opportunities or the right ways to use it, which has been quite gratifying, to say the least.

(Project Partner at Oxfordshire County Council)

Learning about these could have value for the tool's further development. Similarly, training provision for tools such as the Neutral Market Facilitator (NMF) trading platform could be improved by drawing on the experiences and insights of so-called 'expert users', who are likely to be able to identify and express users' needs more effectively than the platform developers<sup>19</sup>.

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<sup>18</sup> Solar Savers involved deploying a time of use electricity tariff to incentivise collective self-consumption: rewarding participants for shifting electricity demand to times of expected generation by solar PV on the shared roof of a block of flats.

<sup>19</sup> [Barriers and Opportunities Report Implementing Trial Phase 1. Sarah Darby, Oxford, 2022.](#)

### 2.8.3 Barrier: Accessing resources and skills to support ongoing engagement

Some interviewees highlighted that ongoing engagement of individual users requires additional resources which they may not currently be able to access:

We didn't have the resources – we were never set up to be contacting individual drivers for each specific event that could be different for each site location.

(Project Partner at Nuvve)

More specifically, the end of project funding makes it unclear how continued engagement with trial participants might be supported after the close of Project LEO. This may be an issue more widely as national policies to engage households in installing new technologies tend to focus on incentivising installation.

It may also be necessary to design new roles and/or upskill existing actors such as technology installers to provide post-installation support in business as usual activities,<sup>20</sup> as well as ensuring they are able to access appropriate resources.

In addition, not gaining timely access to data on participants' energy consumption was identified as a barrier to achieving maximum ongoing engagement with Solar Saver participants. This delayed the delivery of individual feedback sessions intended to help participants to learn more about the trial.

## 2.9 Learning from experiences of stakeholder engagement

### 2.9.1 Opportunity: Evaluating and adapting stakeholder engagement can improve its effectiveness

Project Partners described multiple examples of improving the effectiveness of stakeholder engagement by evaluating their successes and challenges and, where necessary, rapidly responding to change their approach. This included changing the location of trial recruitment stalls, changing the content of messaging about flexibility, and changing times and spaces when households were invited to participate in survey completion, after considering reasons why the strategies initially chosen may have been less successful. This emphasises the need for sufficient time and resources to be devoted to engagement.

### 2.9.2 Barrier: It can be difficult to assess the usefulness of stakeholder engagement, or reasons not to engage

In some cases it can be very difficult to establish why stakeholders do not engage, because these stakeholders are unlikely to respond to further engagement seeking their feedback. This was the case where a survey was distributed seeking to understand the reasons for very different levels of engagement in the Solar Savers trial in different blocks of flats, and received very few responses. This clearly makes it more difficult to respond by adapting engagement strategies, although to some extent it may be possible to base this on the engager's prior experience and expertise.

It can also be difficult to assess the extent to which different groups of stakeholders understand or use different forms of information provided for them, making it more difficult to evaluate and improve approaches to stakeholder engagement. This is most obvious for online and other written communication:

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<sup>20</sup> Provision of a practical and scalable engagement plant to support retrofitting with energy flexibility in Rose Hill, Oxford Summary Report. Bioregional and Transition by Design, 2023, London and Oxford, UK.

[By checking website statistics] you'd be able to see how many people have visited a page, and how many times they have downloaded a document, for example. But you wouldn't be able to see what they did with it. And you wouldn't be able to see or garner any feedback from them saying, was this useful? And if so, how was it used?

(Project Partner at SSEN)

However, it can sometimes also be difficult to assess the usefulness of face-to-face communication: for example, installers may find it difficult to judge whether households have understood their explanations of how to use new technologies.<sup>21</sup>

## 2.10 Project frameworks for stakeholder engagement

Interviewees also identified ways in which the internal frameworks for stakeholder engagement in Project LEO represented barriers and opportunities, which may offer lessons transferable to other projects and contexts. Some features of project frameworks may represent either a barrier or an opportunity depending on how they are managed.

**2.10.1 Opportunity: Consortium project involves a wide range of voices and expertise**  
Project LEO involved a partnership between a wide range of organisations, which presented an opportunity by giving the consortium access to diverse voices to draw upon when engaging with different audiences, informed by existing relationships, reputations, skills and expertise.

**2.10.2 Opportunity: Plans for learning from experiences of stakeholder engagement**  
Evaluation of engagement activities was an explicit principle for stakeholder engagement in Project LEO<sup>22</sup>. Frameworks for stakeholder engagement included multiple planned opportunities to seek feedback from stakeholders, such as workshops inviting participants to share their experiences of participating in trials, which was then used to inform the design of further engagement activities and trial development<sup>23</sup>. In addition, the iterative, agile approach adopted by the project as a whole was also intended to encourage evaluation and adaptation of stakeholder engagement strategies as described under *Learning from experiences of stakeholder engagement*.

It may also be useful to consider how far such plans encourage first order (single loop) or second order (double loop) learning. While first order learning might involve changing approaches to achieve a defined outcome, second order learning goes deeper and may involve changing underlying assumptions about what is actually relevant or desirable. For example, the EnergyREV report on public engagement<sup>24</sup> highlights that partners across PFER funded projects think about users and communities in different ways, and that this has implications for the roles they are assumed to play in energy system change and the strategies that are adopted to engage with them. Second order learning may involve reflecting on and updating such assumptions where appropriate. However, compared to single order learning it is more difficult to achieve.

### 2.10.3 Barrier: Constrained timeframes for stakeholder engagement

Interviewees agreed that achieving effective recruitment and engagement takes time, and needs to be planned for and resourced accordingly. For example, planned timeframes for recruiting

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<sup>21</sup> Parrish, B., Hielscher, S. and Foxon, T. J. (2021) 'Consumers or users? The impact of user learning about smart hybrid heat pumps on policy trajectories for heat decarbonisation', *Energy Policy*. 148(B), p. 112006. doi: 10.1016/j.enpol.2020.112006.

<sup>22</sup> [LEO Stakeholder Engagement Principles Ruth Harris and Nick Banks. 2020, Oxford, UK](#)

<sup>23</sup> See, for example, [Barriers and Opportunities: Market Trials Recruitment. Ruth Harris, 2021. Oxford, UK](#)

<sup>24</sup> [Soutar, I. & Devine-Wright, P. 2022. How do stakeholders engage with the users of Smart Local Energy Systems? EnergyREV, University of Strathclyde Publishing: Glasgow, UK](#)

participants to trials were sometimes felt to be too short, especially when it was necessary to adapt strategies for engagement.

Planning for dedicated time to share learning with external stakeholders was also felt to be potentially beneficial, particularly for stakeholders such as community groups who may not have the resources to fully utilise online written materials produced during the project:

The project ends in March, when the when the trials end. And it seems like there's a lot of activity we could still do if we still had the resource, the time and the funding to do it. So if there was six months to a year of dissemination of learning that was funded for partners to actively engage and influence.

Where does the learning in the story go? Thinking about our fast followers [...] they have the knowledge and the skills and the influence to make that happen. But thinking about maybe communities who think flexible energy may be for them, maybe they want to talk to somebody about it. [After the end of project funding] we're all gone.

(Project Partner at SSEN)

2.10.4 Barrier and opportunity: Starting recruitment before trial details were fully developed Stakeholder engagement and recruitment to trials sometimes began before the details of trials were fully developed. This reflects the innovative nature of Project LEO, but some Project Partners identified it as a barrier to engagement as it made it harder for potential participants to understand what was being proposed, and whether or how they may be able to get involved:

That's the nature of innovation, we were still trying to figure it out and test and learn [...] We wanted people to know about energy flexibility, to feel motivated and want to take part, but we didn't really know what we wanted them to do or how they engage in it.

(Project Partner at SSEN)

On the other hand, in some cases engagement activities were designed to seek input from stakeholder groups such as community groups to inform trial development. This type of co-creation work represents an opportunity to develop project activities informed by unique local knowledge and deepen stakeholder involvement in the project.

To navigate the tension between this barrier and opportunity, it may be helpful to reflect on which role potential participants are being invited to take (such as recipients of trials designed by other people, or co-creators helping to develop trials<sup>25</sup>) and communicate this explicitly; to consider minimum information that stakeholders may need or want to receive from the outset of engagement activities; and to provide skilled support for co-creation activities where these are undertaken.

Learning during Project LEO could also help to inform the development of more defined offerings related to flexibility and smart local energy systems, which could make it easier to engage stakeholders if they can be applied in other contexts.

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<sup>25</sup> Such roles are discussed further by [Soutar, I. & Devine-Wright, P. 2022. How do stakeholders engage with the users of Smart Local Energy Systems? EnergyREV, University of Strathclyde Publishing: Glasgow, UK](#)



2.10.5 Barrier and opportunity: Open roles and responsibilities for stakeholder engagement  
Some project partners felt that their stakeholder engagement activities would have benefited from greater clarity around different partners' roles in engaging with different stakeholders. For example, Project Partners at Nuvve explained that they expected other partners to take responsibility for ongoing engagement with end-users for the chargers installed at their sites:

I think that was something that was missing – who was responsible for really engaging with these customers and stakeholders? We had originally thought that would be more the [project] partner since it was their customers/drivers, and we would be doing the aggregation.

(Project Partner at Nuvve)

This suggests it could be helpful to share expectations and agree roles and responsibilities for stakeholder engagement early on.

However, leaving this relatively open also provided flexibility for project partners to discuss and agree their roles in stakeholder engagement based on experience and learning as the project progressed. Creating a plan shared between project partners, which can be updated with these details as they are agreed, might help to navigate this tension.

### 3 Recommendations

Looking across these barriers and opportunities presented in Section 3 suggests a number of recommendations to support stakeholder engagement, which are outlined in this section.

#### 3.1 Work to understand stakeholders' processes, priorities, concerns and needs

Learnings highlight that the success of engagement activities depends on their alignment with stakeholders' processes, priorities, concerns and needs. This includes, for example, what is needed for effective communication of key ideas; times, places, incentives and paces that are more conducive to engagement; and related priorities and concerns that can trigger interest and motivate participation in flexibility provision.

Routes to understanding stakeholders' processes, priorities, concerns and needs include directly consulting stakeholders and seeking insights from different project partners or intermediary organisations such as community groups. These processes can be supported by exercises including stakeholder mapping and articulating value propositions. Expectations about stakeholders' processes, priorities, concerns and needs may also need to be updated following evaluation of engagement activities.

#### 3.2 Work with and nurture trusted relationships

Experiences within LEO confirmed the value of engaging through organisations and individuals with existing trusted relationships. They also illustrated how new relationships can be nurtured, for example through face-to-face engagement, and also how relationships may deteriorate, for example if stakeholders feel inadequately supported or perceive their efforts are not recognised.

#### 3.3 Recognise, value and make use of stakeholders' input

Experiences within LEO illustrated how stakeholders can provide valuable feedback on engagement activities and smart local energy system offers that have already been developed and tested, contribute to crowdsource data, and also provide unique insights that contribute to offer development. Recognising this, and eliciting and making use of such insights can help to develop better smart local energy system offers.

Stakeholders should feel that their efforts in these areas are recognised and valued. This could include clearly communicating the value of stakeholders' inputs, offering understanding and support if stakeholders find aspects of participation time consuming or difficult, and offering something of value to stakeholders in exchange for their efforts.

### 3.4 Plan to evaluate, learn and adapt engagement approaches where needed

Experiences within LEO validated the approach of planning for evaluation and learning from experiences of stakeholder engagement, and adapting approaches as needed. Past experiences can and should inform further engagement strategies, but further learning should also be expected, not least because some aspects of stakeholders and their contexts are likely to be unique to different projects, and wider changes that influence stakeholder engagement (such as changing energy prices or national awareness of demand side flexibility) will continue to evolve over time. A written stakeholder engagement strategy can support this by clearly identifying opportunities for learning and the ways in which learnings will be utilised.

### 3.5 Provide sufficient time and resources for engagement, for all parties and at different times

LEO Project Partners interviewed for this report all emphasised that effective stakeholder engagement takes time and resources on the part of those doing the engagement and those being engaged. Stakeholder engagement should ideally also occur at multiple times rather than ending at a certain point and should be supported by a written plan to engage with defined stakeholders at different times according to project needs. Within LEO, this included stakeholder engagement as part of developing offers, recruiting participants and supporting their readiness to participate, supporting use, seeking feedback and insights from users and other stakeholders, and supporting external stakeholders to effectively utilise learnings even after projects are completed. This could benefit from the creation of new roles or upskilling of existing roles, for example, to support effective technology use – as well as additional resources, for example, to support a period of dedicated learning dissemination.

In the longer term, learning and resources produced as part of projects should be discoverable and usable by relevant stakeholders. This could require consideration of ongoing website hosting and search engine optimisation as well as producing materials that use clear language and different media, such as videos as well as written reports.

### 3.6 Ensure engagement activities follow ethical principles

Frameworks developed at the start of Project LEO included ethical concerns as one of several key principles for stakeholder engagement<sup>26</sup>. As well as striving to ensure that stakeholder engagement activities and SLES offers do no harm, ensuring ethical and fair approaches to stakeholder engagement can help to increase trust and social acceptance of SLES development<sup>27</sup>. Principles for ethical engagement adopted in Project LEO included: collaboration (working with relevant stakeholders to design aspects of SLES offers and their delivery); inclusivity (working to reduce barriers to stakeholders' access); seeking to create rewarding experiences; and striving to ensure zero harm, informed consent, choice and respectful treatment of all stakeholders.

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<sup>26</sup> [LEO Stakeholder Engagement Principles Ruth Harris and Nick Banks. 2020, Oxford, UK](#)

<sup>27</sup> [Developing an ethical framework for local energy approaches. Saskya Huggins, 2020.](#)

