

# ECEEE Summer Study

## *Is efficient sufficient?*

## Mapping the energy community cooperation chains (ecosystems)

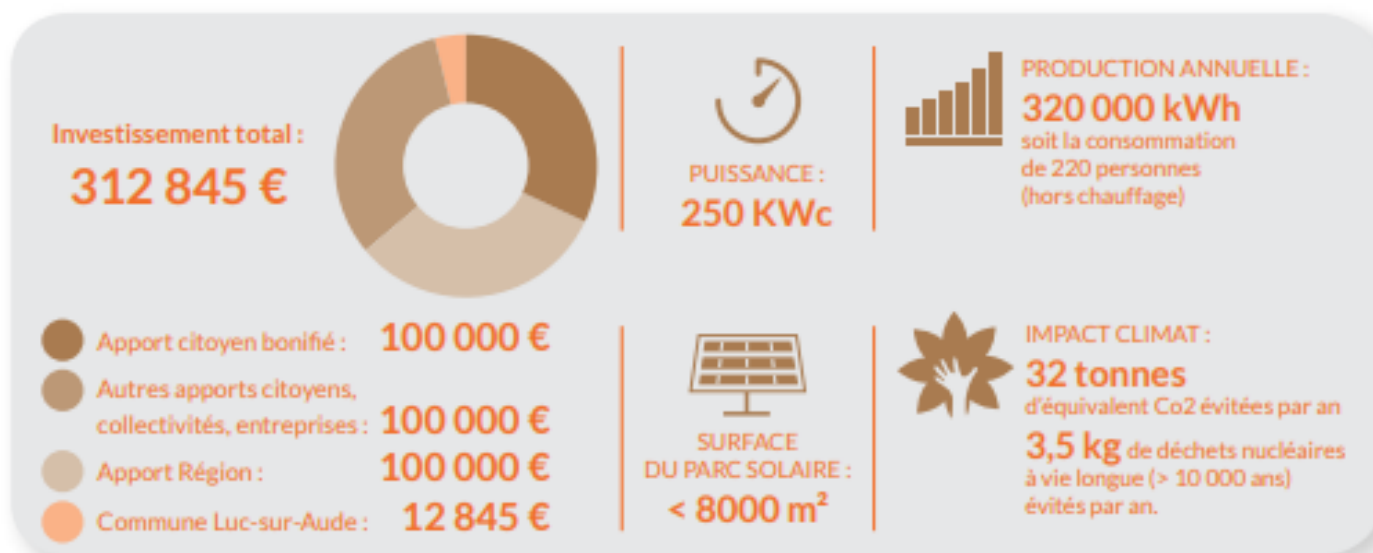
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4<sup>th</sup> June 2019, Presqu'île de Giens, France

# From energy efficiency actions to energy community



J-C Pons, Mayor of Luc-sur-Aude

# Energy communities - our definition and focus in pics



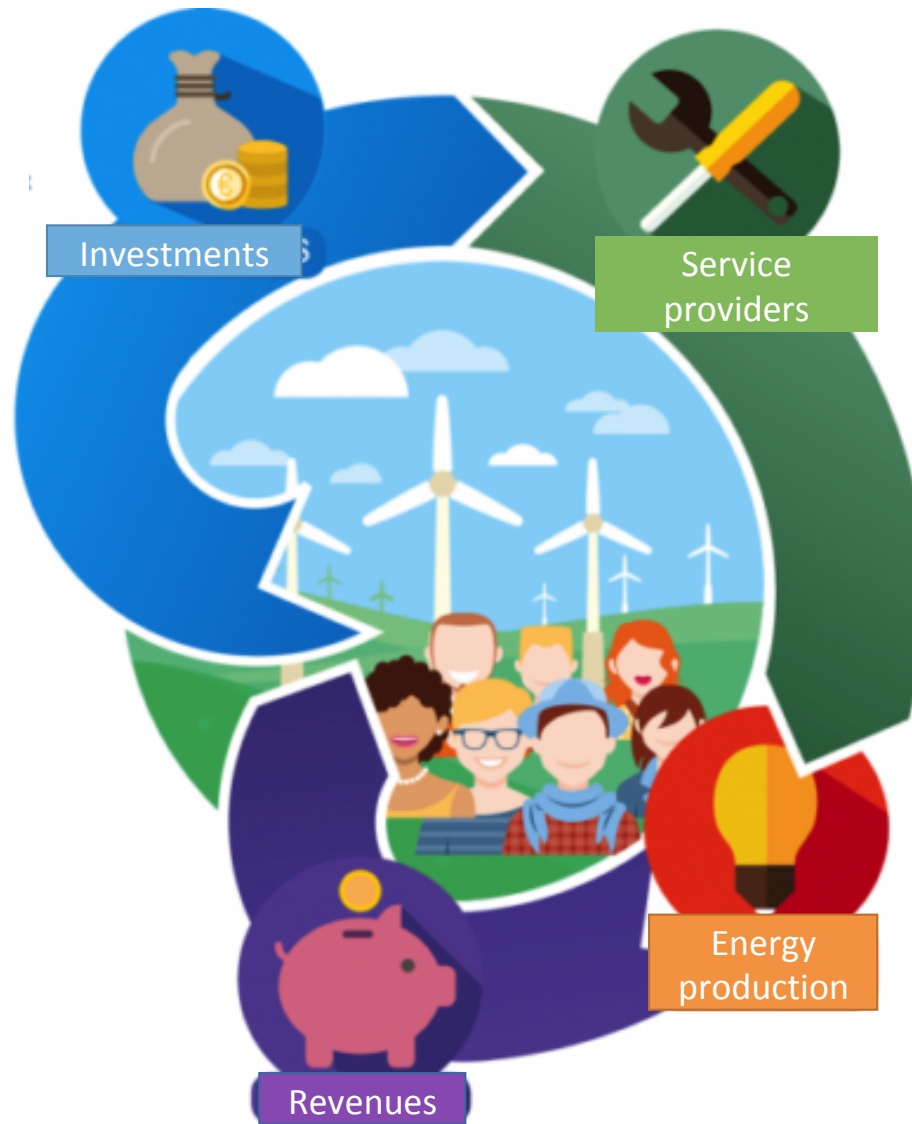
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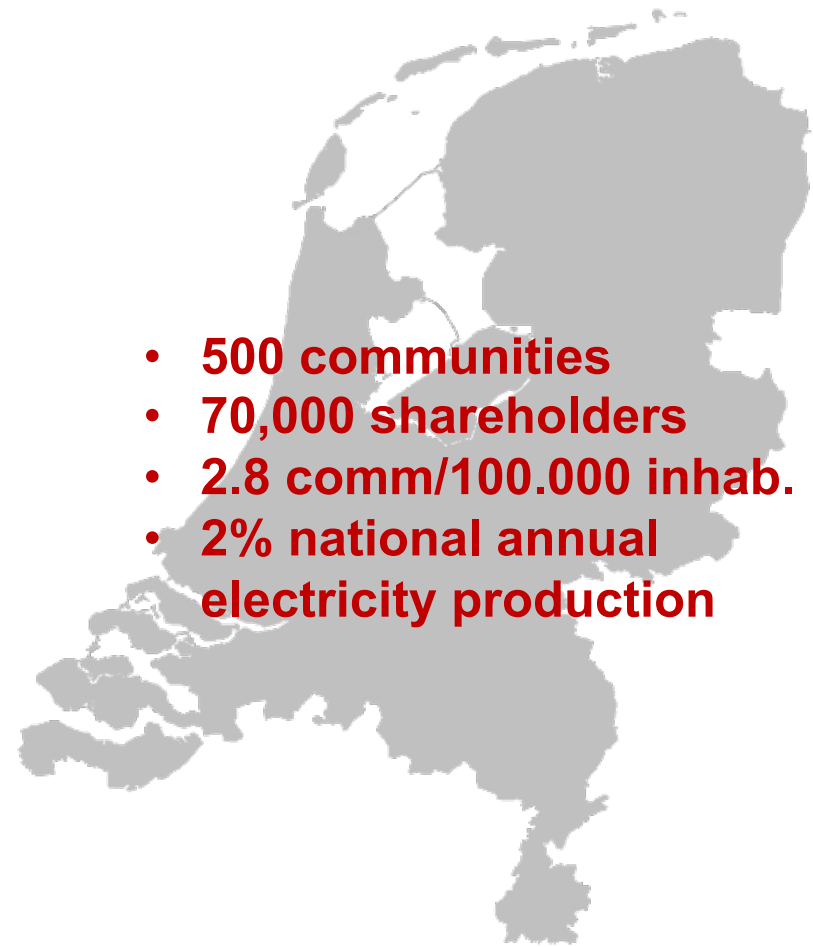
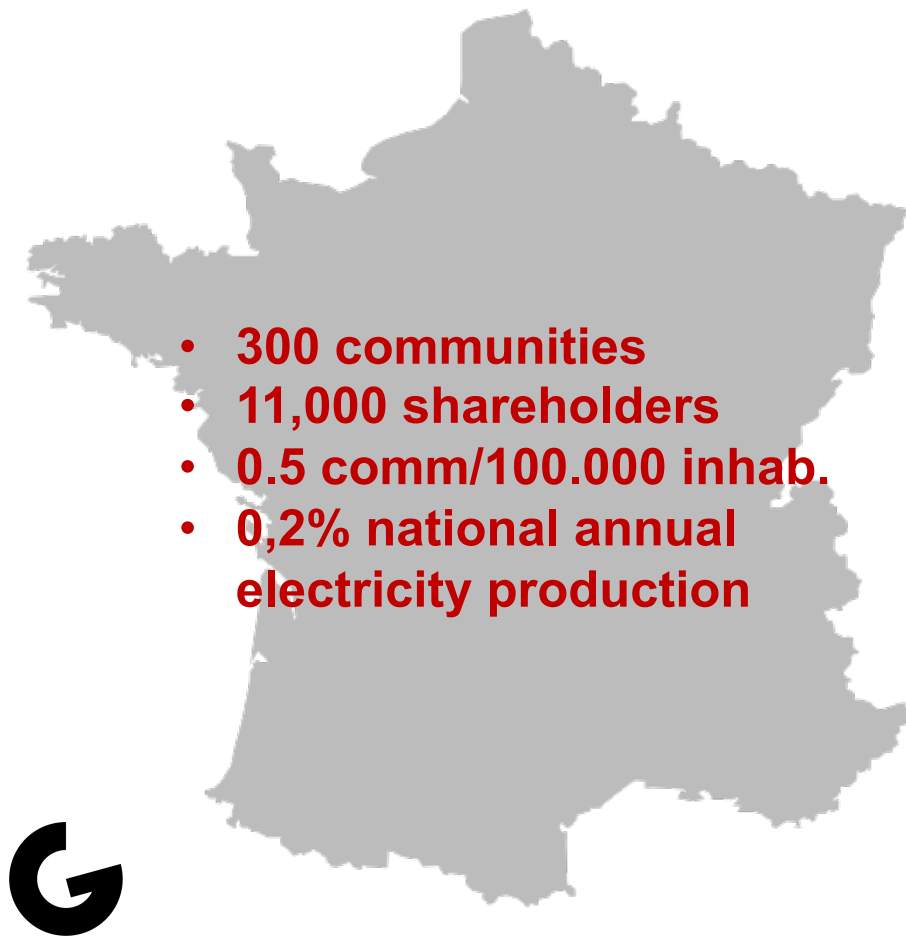
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## A virtuous local economic loop



# Benchmarking between France and The Netherlands



# To better understand key success factors



Our question:

- **Why some communities work better than others? How to develop further?**

Our assumption: communities are fragile alone but robust collectively

- **Besides looking at individual initiatives, we study the cooperation chain that supports their creation and growth**

Our objective

- **Benchmark business models and structure of cooperation chains in both countries**

Our methodology

- **Semi-structured interviews with community members, associations (public or private) cooperating with communities; experts.**
- **26 interviews in France and 10 interviews in The Netherlands**



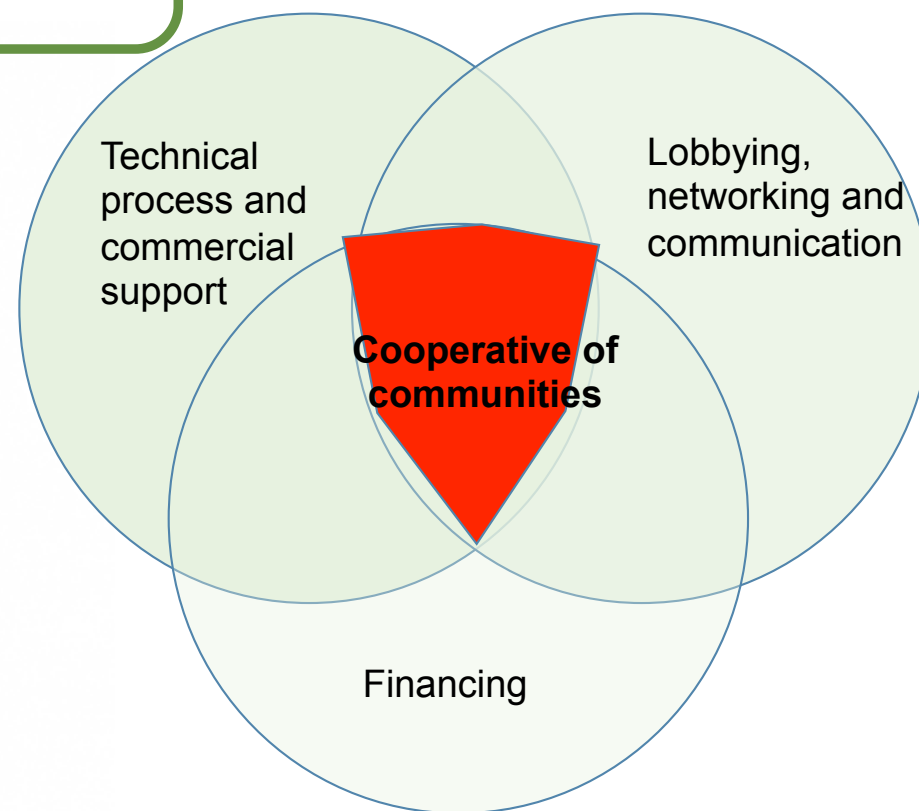
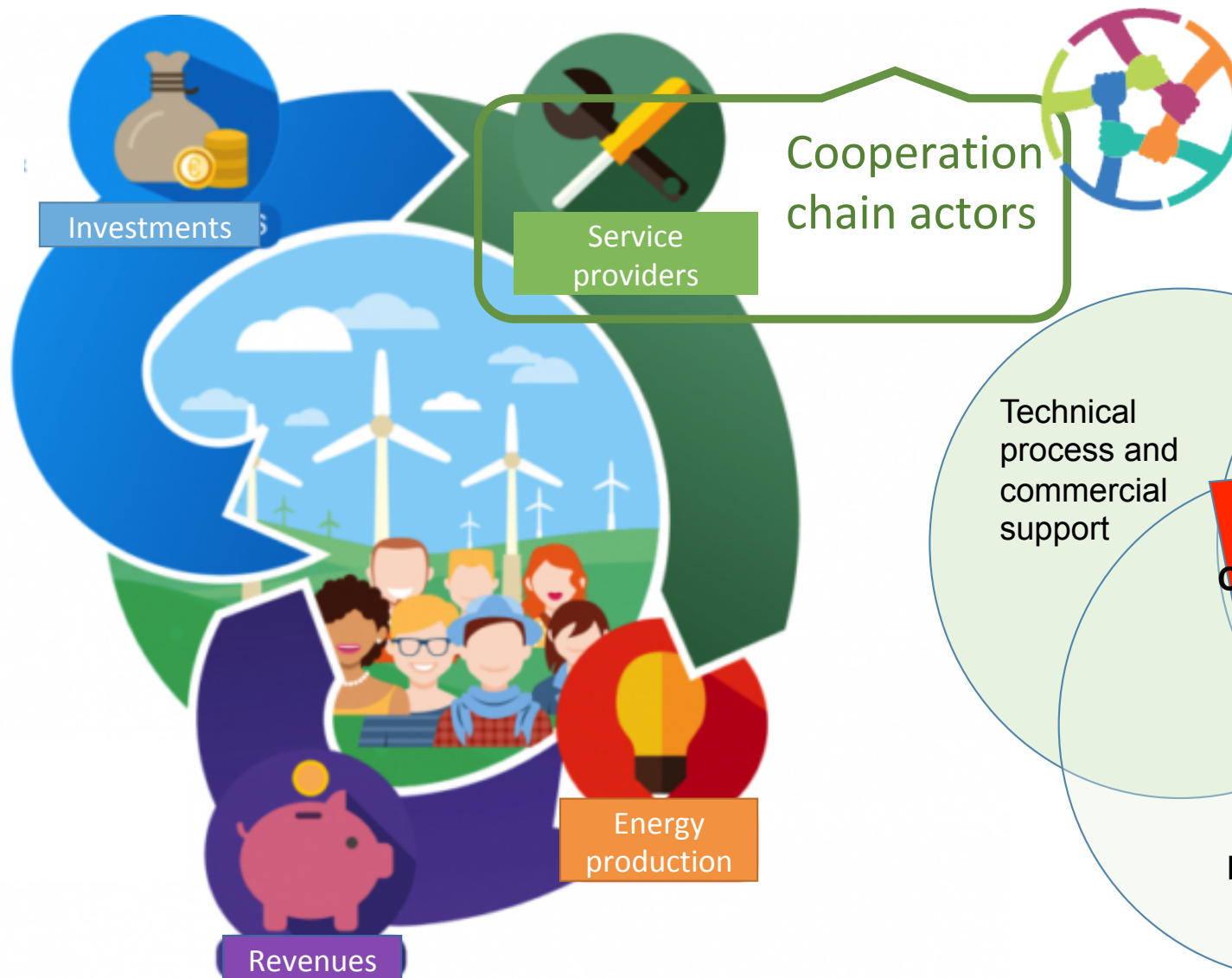
# Comparing energy communities

<i>Value creation</i>	<b>France</b>	<b>The Netherlands</b>
Take back control	X	X
Give meaning to one's savings	X	X
Get an interesting return on investment	(x)	X
Promote local development	X	X
Propose an alternative to incumbent energy suppliers		X
Consume electricity generated locally		X
Energy sufficiency action, energy literacy		X



*Value delivery/value capture*







# Energy cooperation chain actors and roles



	<b>Networking/ Lobbying</b>	<b>Technical &amp; commercial support</b>	<b>Financing</b>
<b>France</b>	<ul style="list-style-type: none"> <li>-Network not yet converging (Centrales Villageoises, Energie Partagée Association)</li> <li>-More distributed lobbying (Enercoop, Energie Partagée, SER,...)</li> </ul>	Single active supplier (Enercoop)	<b>Energie Partagée Investissement</b> for big projects (FIT, EDF as a mandatory passage point)
<b>The Netherlands</b>	<ul style="list-style-type: none"> <li>-Structured knowledge platform (Hier Opgewekt) at national level</li> <li>-Consolidation of lobbying actors within a single entity (Energie Samen)</li> </ul>	Diversity of competing suppliers, incl. community itself	Completely liberalized (FIT, clients' fees, targeted customers etc.)



# Keystones (central role) – France

Small projects

Big projects

National



Financial support



Supplier/  
technical support

Regional



Lobby/network



Commercial  
and technical  
support of  
production

Local

Hyper local



Commercial and  
technical support of  
production

# Keystones – The Netherlands



# Benchmark analysis

Economic model of cooperative of communities:

- **Dutch model depends to a lesser extent to public funds, is professionalising the activity, and offering multiple services**

Independent model to energy utilities:

- **French ecosystem is evolving independently to incumbent utilities, while Dutch ones are part of the cooperation chain (DSO, Greenchoice, Engie, Eneco....)**

Geographical scope

- **The ecosystem of smaller projects is hyper local in France**
- **In the Netherlands, roles are distributed according to the geographical scopes**

Ecosystem evolution

- **In France the evolution is driven by savings and around Energie Partagée Investissement**
- **Multiple drivers in The Netherlands with the ambition to make energy community ecosystem self-sufficient.**

## Preliminary recommendations

- **Both countries depend strongly on public funds (FIT, subsidies, etc.) – ex UK**
- **Role and involvement of utilities can be key but is driving away community from its philosophy (independence)**
- **Focus support on non-national cooperative of cooperatives**
  - ✓ **To link local ecosystems to the national one**
  - ✓ **Mutualisation of skills to make economy of scale and allow professionalization**
  - ➔ **Region or province as a « momentum » to develop economic activities of energy communities**



# Research agenda

Develop business model analysis

Add UK to the benchmark analysis

- **3 interviews so far**

Questionnaire targeting energy community subscribers

- **To better understand the identity of these communities in France**



Thank you for your attention

Any questions?

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