REPORT:
HOME ENERGY ADVISOR (HEA) QUALIFICATION SCHEMA

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1. Presentation of ASSIST Project

1.1 ASSIST overview and introduction

ASSIST is a 36-months European 'market activation and policy orientation' project to tackle fuel poverty and support vulnerable consumers. It intends to actively engage consumers in the energy market and positively change behaviour in relation to energy consumption and to influence design of policy at all levels to tackle fuel poverty issues.

Based on the conclusion of the Energy Citizens' Forum and of the European Vulnerable Consumers Working Group, the project intends to combine activities addressing both energy and social dimensions as fuel poverty is not only an energy issue nor can it be tackled in isolation of the bigger issue of poverty. More specifically, ASSIST strategic objectives are to contribute to:

- tackle energy poverty;
- reduce the main barriers of the energy market faced by vulnerable consumers;
- support vulnerable consumers to be more efficient with their domestic energy consumption (electricity and gas).

To fulfil its goals, the project foresees diversified and correlated research, networking and in-field actions, consistent with the relevant national and European scenarios. Among them, ASSIST intends to create a network of innovative professional figures supporting vulnerable consumers in their domestic energy consumption: the **Household Energy Advisor (HEA)**[1].

1.2 "WP3 - Home Energy Advisor Training"

The third project' work-package aims at:

- **Building the HEA qualification schema**, grounded on both national and European desk and in-field analysis and defined according a modular system of correlated: occupations and job roles; activities and sub-activities; knowledge, skills and competences;
- **Defining the HEA training program** built on learning outcomes and, for each learning outcome, contents and methodologies (including the distance learning options). The modular approach - consistent with the European training, profession and learning frames and methodologies - enables a customisation and personalisation of the training course according to: country context (job contexts,

[1] This profile, referred in the project proposal as VCEA (Vulnerable Consumers Energy Advisor) has been renamed in "Household Energy Advisor (HEA)". HEA will be used in public communications while the term VCEA will be used only when requested by the project.

energy and welfare issues and frames and so on) and entry level of the single trainee (in terms of knowledge, competences, experiences, professional profile and so on).

- Defining effective **HEA training strategies** at each national level; to this extent training strategy guidelines are realized at each national context (Deliverable D3.2), on the bases of a common frame defined and shared by AISFOR aimed at guiding the operative choices related to overall training action (from educational design and training plan definition to its promotion and target involvement to its evaluation);
- engaging at least 75 potential HEA and delivering to them the **HEA training program**.

1.3 Document overview and structure

The present document intends to report, compare and integrate the evidences collected at each national level with reference to the definition of the HEA innovative professional profile and to the relevant training program in order to build a common - but modular, to be contextualised at each national level - HEA profile.

The present document illustrates the:

1. **Activities carried out and actors involved for the HEA profile definition** (Chapter 2). The HEA profile building has been built through desk and in-field activities consistently with the common guidelines (Annex 1). Methodologies, activities and actors involved are briefly described (a wider description has been furnished within the national reports on which bases the present document has been developed);
2. **HEA professional profile and training program** (Chapter 3). HEA profile (*occupations and job roles; activities and sub-activities; knowledge, skills and competences*) and training (*learning outcomes and modules defined per each activities and job contexts*) are described with a common but customizable frame, according to the national contexts and the specific HEA working contexts (social services vs help desks vs social housing and so on) and entry profile (unemployed, vulnerable consumer, social operator, help desk operator, and so on).

HEA Profile Executive Summaries in each national language has been prepared to be used also a stand-alone document supporting communication & valorisation activities and the HEAs engagement (Annexes 2-7). Annexed to the document are also the D3.1 Guidelines (Annex 1) focusing on the WP3 research activities (desk and in-field) to provide the necessary information (input and expected output) to define the profile of the HEA and prepare the relative HEA Qualification Schema.

The core chapter of the document is the one on the “HEA Qualification Schema”, prepared on the bases of the partners’ contribution as described in the following paragraphs. Attached to the present document, the executive summary of the HEA Qualification scheme in all the project languages (Annexes 2-6) in order to support both project general dissemination and specific communication activities related to HEA training, networking and in-field actions as well as well as the policy orientation ones

The HEA Qualification Schema describes the job and competences characteristics:

- Profile in terms of:
  - HEA roles and working contexts;
  - HEA activities and sub-activities;
  - HEA knowledge, skills and competences;
- Training program: learning outcomes and modules defined according to the competences required for the activities to be undertaken in the diverse HEA working contexts and roles.

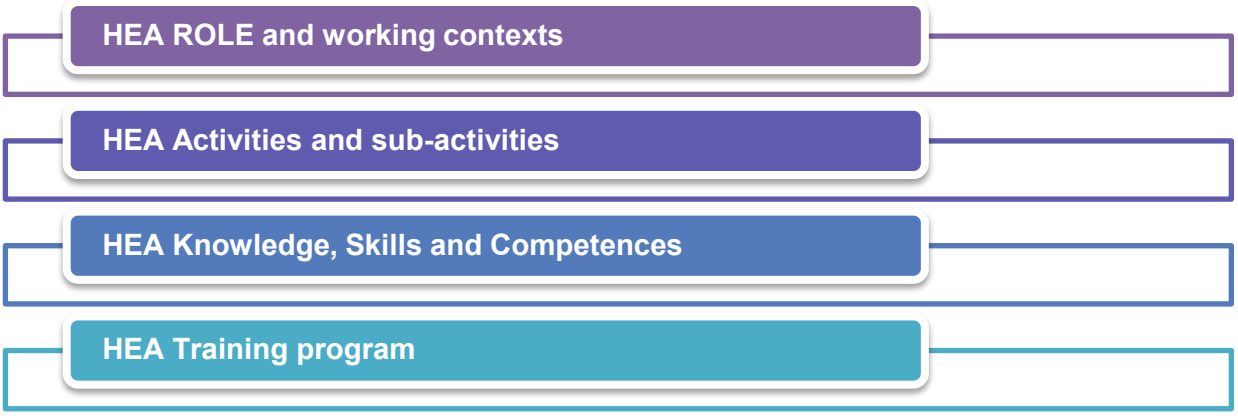


Figure 1 - HEA Qualification Schema

It is important to underline that qualification schema reported in this document is the general common frame which will then be adapted and customized by the partners according to their national contexts within the ASSIST strategy to be implemented in each country for the HEA training, network and action.

2. Activities realized, methodologies employed, actors involved

In order to carry out the HEA profile definition, a number of activities were undertaken at each national level, following the common guideline (see Annex 1) prepared by AISFOR and shared with all the partners in the initial stage of the WP3 development.

The inputs, provided in the guidelines, to build the common HEA Qualification Schema are:

- Structure and contents of the HEA qualification schema and approach overview;
- Preliminary HEA identikit;
- Guidelines to desk and in field research (including the interview structure and guide);
- Communication to engage stakeholders and collect their expression of interest;

- Template of HEA national context report to be filled in by partners.

The output prepared by the partners is the HEA National Context Report which has represented the basis for the preparation of the present D3.1 HEA Qualification Schema.

2.1 The preliminary HEA identikit

Figure 2 Main working contexts of the HEA

An initial HEA identikit has been drawn as a starting point for the HEA profile and training course definition; it has represented a first frame and "guide" for the analysis of the national contexts and for the interviews with selected stakeholders.

ASSIST proposes the development and valorisation of an innovative professional profile, the Home Energy Advisor (HEA) who may work within **energy, social and institutional organizations** as well as for private energy market actors such as energy companies (as in the figure).

A first HEA identikit can be summarised as follow: ***The HEA has direct contacts with the target group (vulnerable consumers) to provide energy efficiency support to vulnerable consumers and more specifically to energy poor consumers. The HEA delivers information, support and advice to them in an easy and comprehensive and practical manner to improve their energy consumption behaviours and also facilitate access for them to supporting financial measures/incentives.***

Although the differences in each working context, there are three main roles and activities of the HEA:

- energy consumption behaviour analysis;
- energy behaviour support & check-up;
- advise and communication to consumers.

The identification of these first "macro-activities clusters" has guided the definition of the profile and the consequent (desk and in-field) research frame and guidelines. Activities (and sub-activities) identified within these three main clusters have been then correlated with competences requirements.

Figure 3 - Three main areas of activities of the HEA

The activities carried out within this task of the ASSIST project have enabled to modify, specify and detail this first identikit and to “translate” it in terms of specific roles and working contexts and, consistently, of activities and competences related to the diverse working contexts thus defining the common frame for the HEA profile and training as defined in this document.

2.2 Activities realized and methodologies employed

The HEA qualification schema and the training program have been built on the evidences gathered through desk and in-field national activities carried out.

2.2.1 HEA desk research

The desk-based research has been based on previous project activities (mainly on results from national context analysis and market survey in WP2) and on a dedicated desk activity aimed at identifying similar professional profiles within:

- National Qualification Frame. Partners have analysed the existence of professional profiles similar to the HEA within the national (or regional) qualification frame (NQF) and, if present, the features of such profiles in terms of: qualification level, occupation, role, activities and, if available, skills set (& requirements);
- other piloting national and European projects related with HEA scope and aims. Partners have verified the existence of such figures and highlighted the common points with the HEA.

Moreover, partners have analysed, at each national level, the existence of training courses, initiatives (including pilot projects) and learning resources on: social system, with focus on vulnerable consumers support actions, services and so on; energy system, with focus on retail system, domestic energy consumption, energy saving and efficiency promotion, incentives and funding frames.

2.2.2 HEA in-field research

In-field research has been carried out in each country addressing a consistent and diversified cluster of stakeholders, belonging and representing both social, energy and institutional sectors in order to collect stakeholders’ feedback to integrate the evidences of the desk analysis. Further the direct activity with national stakeholders enabled partners to:

- have a complete picture of all possible roles, activities and competences of the HEA within the various potential occupation and job contexts;
- share the HEA profile definition process with all relevant stakeholders, so as to guarantee the goodness and robustness of the profile itself;
- involve and engage stakeholders so as to launch collaborations also for the HEA training, action and networking activities as well as for the HEA network sustainability after the end of the project.

The methodology mainly used for the in-field action were structured interviews through direct meetings with the relevant stakeholders involved supported also by: emails, skypes and phone calls (the guideline and the proposed structure of the structured interview is reported in Annex 1). In carrying out the in-field research, partners have employed the most consistent methodological mix according to their specific country context and actors involved.

The evidences collected through the direct contacts with stakeholders have also been enriched and validated also by the evidences collected during the "**ASSIST Think Tank**" (WP7). Common methodological element of the in-field research activities and of the stakeholders' involvement are:

- **Integration with market survey** (WP2 - task 2.5). In some cases the stakeholders interviewed for the market survey were relevant also for the in-field research of the HEA profile and training definition. In such cases, the actors were jointly engaged and partners delivered both the market survey questionnaire as well as the HEA definition one;
- **Focus on adding depth and/or clarification to specific areas of the HEA profile**, including the clarification of the diverse HEA working contexts;
- **Opportunity for collecting expression of interest** for: sending participants to the HEA training courses; participating as "host" of the ASSIST action; valorising and multiplying the "HEA network".

A first evidence from interest collection is represented by the following table.

Table 1 - Expression of interest collected during the in-field research for future ASSIST activities

	ITALY	SPAIN	UNITED KINGDOM	POLAND	BELGIUM	FINLAND
In sending participant to the HEA training	All sector actors involved directly / indirectly in energy poverty (from social to technical actors, from institutions to market actors, etc.)	All social and energy, institutional, showed initial interest in training their professionals/volunteers	The aim is to engage voluntary and community agencies during ASSIST think-tank event and to explore potential co-volunteering opportunities.	Social Service Office of Warsaw intends to use the knowledge gained to help vulnerable consumers during the public consultation (direct contact with people requiring any kind of assistance / social assistance).	The idea is to involve volunteers, but the possible partners need to be contacted. The existing HEA network is also interested in taking the training	Majority of the stakeholders showed interested in sending participants to training
In hosting trained HEA for the ASSIST action	Some stakeholders have expressed their interest in hosting the HEA	Charities al local social services showed initial interest	Warm & Well (at Severn Wye) will host the 6 volunteers and these will be linked to voluntary agencies that access vulnerable people's homes. Some of local authorities are identifying vulnerable and making referrals to Warm & Well and they would like the volunteers to be involved in home visits.		The existing HEA network (Stebo and Komosie) are willing to support the volunteers, however there are some concerns. E	Different potential areas are being explored
In contacting vulnerable consumers	Mainly social actors, but also institutional ones have expressed their availability in acting as intermediary with vulnerable consumers	Charities al local social services showed initial interest	Yes, some are in touch with vulnerable consumers and refer them in to the advice support. Mechanisms we are likely to use are referrals (via social prescribing) from local authorities, voluntary agencies or community connectors.		Social actors can act as intermediary, but also Eandis has direct contact with vulnerable consumers who have a budget meter or having problems to pay their energy bills.	The main problem in Finland is that there is no formal definition or grouping of vulnerable people in energy sector

Other (and TRAINING / ACTION TARGET)	The current idea is to involve municipality technical and social offices; social housing; companies/retailers; contact centres; unemployed/ professionals; youngers/students.	The current idea is to involve different profiles: front office agents from small DSO and energy retailers; unemployed people which are potential VCs too; social operators (both professional and volunteers)	The majority of local stakeholders are very supportive of the establishment of volunteers and are likely to seek out volunteers to support specific activities. The recommendation in the first instance is that they work alongside current advisors and link to existing voluntary agencies that work with vulnerable consumers.	The current idea is to involve social operators belonging to the government social service office (18 centres)	The current idea is to cooperate with the existing HEA network. They could serve as a back-office giving advice to the volunteer HEA's, as they are experienced in the matter and with the target group.	Some stakeholders expressed interest in including tasks directed specifically to vulnerable consumers to tasks currently done as part of their advising services. Training targets: vulnerable consumers social workers, Motiva Energy Advisors, Elder repair advisors

2.3 Actors involved

For the in-field research, amongst all national actors dealing with energy poverty, partners have selected those who were able to provide valuable feedback for the definition of the HEA. Although the different mix of stakeholders engaged in each country, the following characteristics have been the basis for stakeholders' engagement in this task:

- Assure a proper balance between social, energy and institutional actors and, within these three main categories, a balance among the diverse segments (i.e. for social actors: consumers associations, third sector and social services);
- Define the stakeholders' group according to the country specific situation and interest to the HEA-related action. For example in those countries where the HEA will have a more defined working contexts (within energy versus social sector), the cluster of stakeholders included more representatives related to that sector (i.e. in Belgium with reference to the "Energie Decree" defining the qualification frame of a HEA similar profile; in Spain or Poland where a greater interest is given on the empowerment of social operators in terms of HEA activities and competences).

It must be noted that even though partners selected the stakeholders to ensure that the interviewee would have the knowledge needed to provide the insight requested, the depth of the responses during the interviews are significantly different (some were very detailed whilst others provided mainly generic or no responses where analysing the expected role, activities and competences of the HEA). The depth of response reflects both country and sector engagement on the issue of the overall energy poverty and (vulnerable) consumers energy behaviours. It can be said that the questions related to HEA profile generated a discussion more than specific straight forward answers, underlining the fact that the awareness on energy poverty is still low in some partners' countries (mainly Finland, Italy and Poland, with respect to Belgium, Spain and United Kingdom).

3. HEA professional profile and training program

Based on the ESCO[2] and EQF[3] approach, the HEA profile and training programs have been built in order to have a common frame for the project development but customizable according to the national contexts in terms of national occupational frames as well as energy poverty related frames.

[2] European frame of ESCO ("European Skills, Competences, Qualifications and Occupations" a European 2020 initiative by DG Employment, Social Affairs and Inclusion and DG Education and Culture of the European Commission https://ec.europa.eu/esco/portal/escopedia/Occupation

[3] The EQF is the European-wide qualifications framework which joins the qualifications of different EU members together which enables to have a common European frame of qualifications valid in different European countries and thus easier to understand (https://ec.europa.eu/ploteus/content/descriptors-page)

3.1 HEA Roles and Working Contexts

3.1.1 Overview and approach

The HEA qualification schema describes the HEA occupation, defined within the European frame of ESCO as *an occupation is a grouping of jobs involving similar tasks and which require a similar "skills set*". Occupations should not be confused with jobs or job titles. While a job is bound to a specific work context and executed by one person, occupations group jobs by common characteristics".

The **HEA role** is described in terms of output and/or impact generated, the mission of the **occupation** or how the occupation contributes to the achievement of the core goals. It includes also the role of the HEA occupation in relation to other occupations, i.e. possible relations with other jobs for each of the working contexts investigated such as an HEA who works together in a team with civil servants within the occupational fields of social department delivering assistance to family and vulnerable target groups as well as with social operators in delivering social services

The **HEA occupation working context** in terms of sectors, fields, areas which includes all the various sectors potentially interested in employing / training an HEA and the role of the HEA in relation to other existing professional figures. The possible range of working contexts potentially relevant for the HEA - generically identified in the project technical annex and then confirmed and detailed by the research findings - are: Energy (representative organizations, authorities, as well as utilities and energy agencies); Social (social operators associations, social departments of universities, consumer associations, charities (red cross, caritas, so on), housing associations); Institutional (municipalities social department, regions, ministry, so on). The **potential integration** within the national and regional qualification frames as a whole (new profession) or as professional area/competences/role to be developed in existing professional profiles.

The following picture summarizes the definition/approach employed in defining the methodological guidelines as well as the main evidences emerged from national reports for each section of the qualification schema.

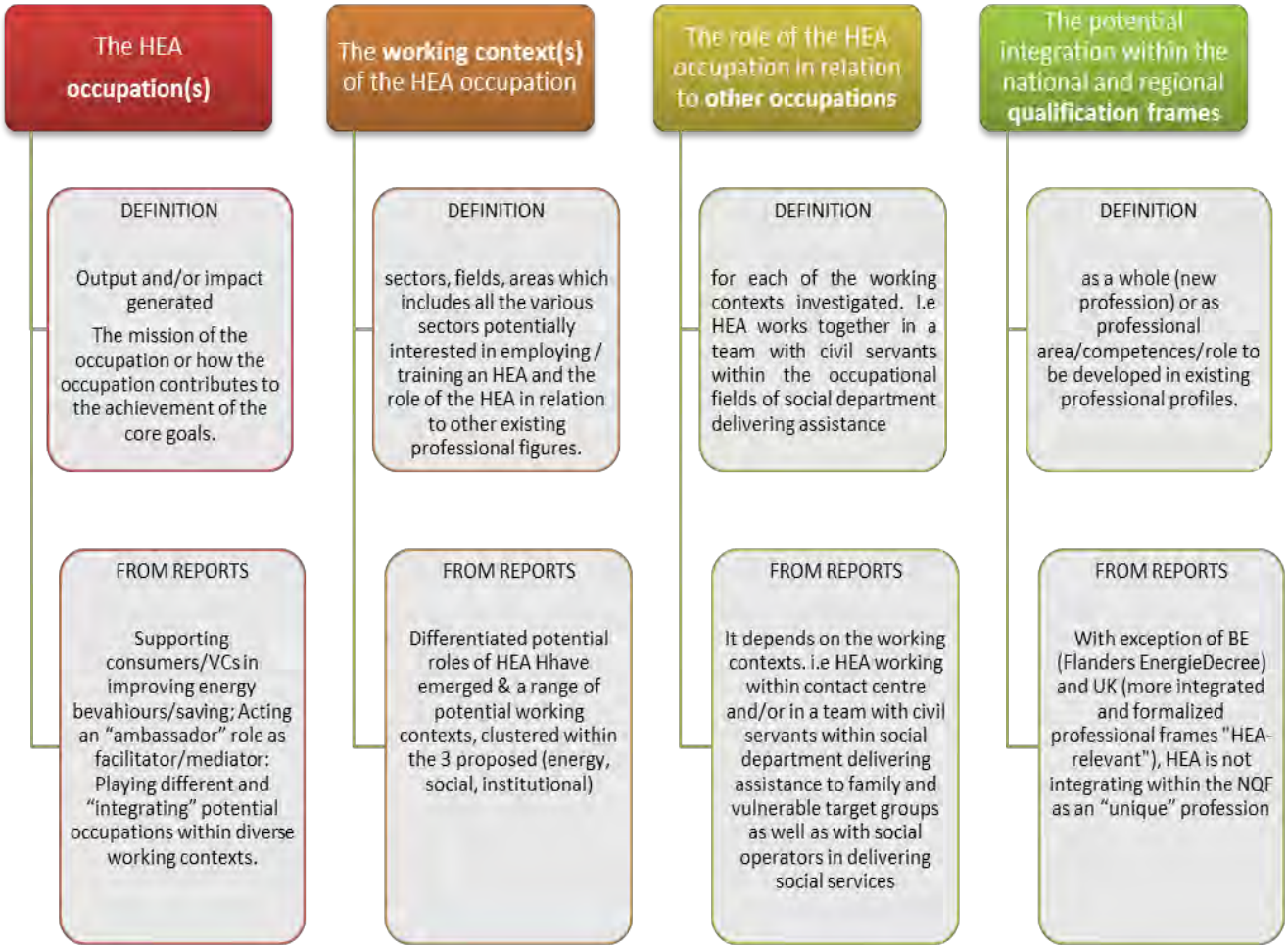


Figure 4 Qualification schema frame and evidences from reports

3.1.2 HEA Role: occupations and working contexts

In all countries, desk and in field research have confirmed that the introduction of HEA profile can contribute to tackle energy poverty and the main barriers of the energy market faced by vulnerable consumers. This is "considered true" by stakeholders especially if the HEA is considered as a supporting and/or facilitating and/or mediating role, taking also into account the quite high barrier represented by lack of trust and cultural approach. These points have emerged with different weights among partners countries consistently with the approach and "maturity" on energy poverty.

In all ASSIST countries, within the relative regional and national qualification frames there are not professional profile similar to the HEA, with two exceptions:

- **Belgium**, where a similar profile exists within the Flander qualification frame, the *Energiedecree*. In Belgium, HEA's role would be "to guide vulnerable consumers to lower their energy usage by making them conscious about their energy consumption and giving tips and advice during an analysis of the house of the VC";
- **United Kingdom**, where many different HEA similar profiles exist and are defined and detailed also in terms of EQF levels and working contexts.

In all partners countries, piloting projects focusing similar profiles have been carried out and have been analysed within ASSIST to leverage on lessons learnt and to:

- Better draft the profile in terms of "occupation" ranges/potentials and of expected impact/contribution;
- Valorise existing (learning, working, and so on) resources.

The analysis of piloting projects have confirmed the **HEA potential role as mediator or facilitator, working within a multi-professional team**. Moreover, the potential of the HEA within a wider building requalification effort, supporting the building manager (within both the energy auditing and the "relational" roles) has emerged. HEA is not a "unique" professional profile and, consequently, it cannot be directly integrated within regional/national qualification framework.

The national researches and the compared one have also strongly confirmed that:

- HEA role should be intended as "occupation" (in the ESCO terms as reported)
- HEA cannot represent an "autonomous" professional profile but a supporting role within both consumers care and social services and other working contexts;
- HEA role can be **played by some already existing professional profiles** (social assistant or civil servants or consumer association advisor).

The table below represents an example of the HEA profile with reference to the "team occupation" in more relevant working contexts. Particularly, it refers to the wider description of potential HEA occupations for **unemployed as working in an enlarged team in Spain** and reports the role differentiation among the three main "occupation" context (energy, social and Institutional).

Energy	
Energy agencies	HEA can work in team with Energy technicians
Energy utilities (both company itself and Corporate Social Responsibility	HEA can work in team with energy supplier's help desk or specific programs targeting vulnerable consumers
Energy organisations	HEA can work in team with energy experts and technicians
Energy services companies	HEA can work in team with HEA can work in team with energy experts and technicians
Energy consultancies	HEA can work in team with HEA can work in team with energy experts and technicians
Social	
Social organisations and charities	HEA can work in team with social agents giving advice to vulnerable users
Consumers associations	HEA can work in team with technicians giving energy advice to consumers. For example through workshops (energy bills, energy use at home etc)
Housing associations	HEA can work in team with experts and technicians working preparing housing conditions for vulnerable users.
Institutional	
Local/regional social services	HEA can work in team with social workers giving support on energy issues of their users
Consumers services	HEA can work in team with technicians giving energy advice to consumers. For example through workshops (energy bills, energy use at home etc)
Environmental education services	HEA can work in team with dynamizer/catalyst/activist

Figure 5 - HEA possible role within different working contexts

As anticipated, HEA can play **different and "integrating" potential occupations within diverse working contexts**. The three main contexts identified by the project (energy, social, institutional) have been confirmed by actors involved who have further detailed them as follow:

1. **Energy sector,** with reference to representative organizations, authorities, energy agencies, energy services companies, energy consultancies and energy utilities. A "sub-sector" in fact can be represented by the same market actors - utilities, DSOs and energy companies in general, which could be interested on a "Corporate Social Responsibility" perspective and/or to improve their services to consumers by employing an HEA and/or training their employees employed within the network of customer care. Although some operators have pointed out that any energy retailer has to provide information to his customers (through website and contact centre), at the same time, the opportunity of enlarging the existing "help desks" or consumers services has been explored also in terms of effective ways to reach and engage vulnerable consumers. More specifically, HEA specific occupations within the "energy sector" have been indicated as:
   - contact centres;
   - energy agencies;
   - individual professionals (engineers/other energy-related technical professions).
2. **Social sector** with reference to very diversified contexts and organisations such as: third sector, social departments and services, consumer associations, social organisations and charities (red cross, caritas, etc.), housing associations. In these contexts a peer to peer advising process by vulnerable people who have undertaken the HEA training to other vulnerable people may be activated. The most relevant HEA specific occupations within the "social sector" have been indicated as:
   - social services;
   - consumers associations;
   - third sector;
   - social housing and ausers
3. **Institutions** with reference to local/regional social services, health services, environmental education, as well as energy authority and energy institutional agency (as GSE group in Italy). Two main HEA "institutional" contexts have emerged as more relevant:
   - Public energy agencies, contact centres, services… related to energy policies/incentives;
   - Municipalities' Technical Offices.

The scheme below reports the possible working contexts of the HEA in the three sectors:

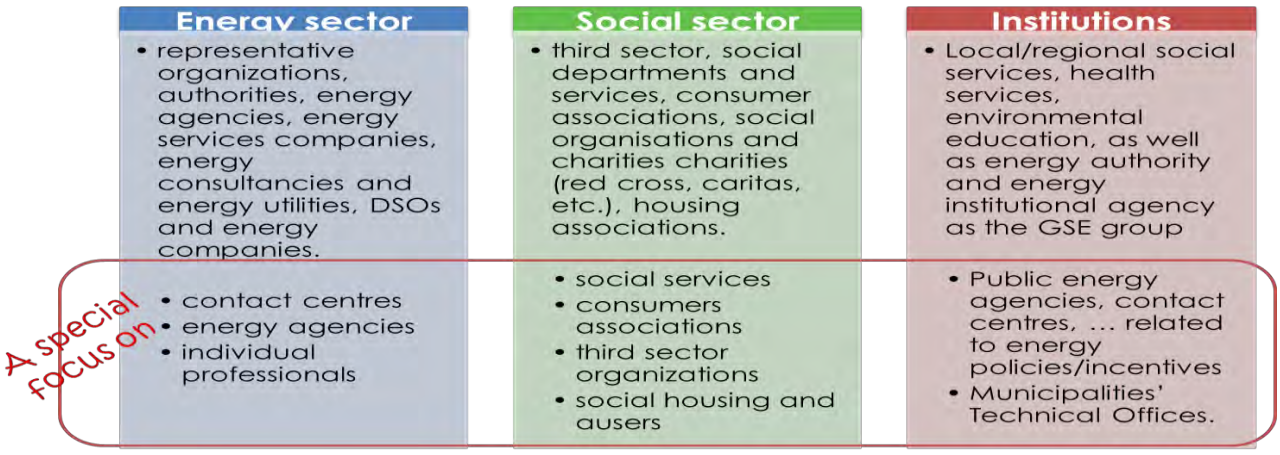


Figure 6 - Working contexts of the HEA in the three sectors

3.1.3 HEA Role relevant common dimensions and critical issues

Most respondents have pointed out for all the occupations and working contexts:

- **difficulties** in reaching the target of vulnerable consumers. For "social-related" working contexts it is more suitable to reach them but it's more difficult to develop proper technical skills to fully inform and support them. This in turn makes the peer to peer dimension very challenging. The social housing context is potentially the most suitable;
- **need** of keeping a straight differentiation between supporting energy saving vs energy efficiency. HEA can support awareness, competences development and users engagement / empowerment with reference to the energy saving behaviours while for supporting energy efficiency more complex technical skills, belonging to other (existing) energy advising professionals are needed as well as more "deeper" (and more costly and complex) actions on the overall building.

These last considerations confirm the opportunity of considering HEA as working within and enlarged professional teams. Many country reports have reported the suggestion of considering HEA **working context as "enlarged",** where HEA cooperate or support other professionals (i.e., the building manager or the energy contact centres and so on).

3.2 HEA Activities and Competences

3.2.1 Overview and approach

As already reported, according to the starting HEA's identikit and to the common guidelines, the main HEA activities have been clustered into three main areas:

- energy behaviour analysis;
- energy saving check-up and support;
- communication and advise to consumers.

The three activities areas have been confirmed in all national research (with reference to both desk and in-field activities) which have also detailed the relevant sub-activities and relevant skills and competence.

The **articulation and weight of the sub-activities** vary according to the diverse **contexts** of action (energy vs. social vs. institutional) and among **partners countries**. Accordingly, HEA activities have been articulated in terms of modular system of activities, to contemporary valorize a common schema and the national diversity. The **modular approach employed** in identifying and describing the HEA activities and sub-activities as well as related competences required, represents the conceptual and operative frame for the definition then of the HEA training and action processes (see next par. 3.5).

3.2.2 Energy behaviour analysis

All actors involved confirmed that the first main task is the energy behaviour analysis.

The definition of the "borders" of the core **energy behaviour analysis** has been deeply debated by respondents in all countries. Some respondent have outlined that **HEA cannot carry on a proper/complete auditing process**. Most respondents have also highlighted that HEA can contribute to this task within a multidisciplinary group.

It is important to underline that the **energy behaviour analysis** may include also the action of providing advice and information also on main existing incentives/opportunities (i.e. in Italy 60% of social energy bonus target are not aware of its existence). However the informative action becomes more consumer-specific and has therefore been included in the second macro activity area of HEA (par. 3.4.3).

Main activities related to the Energy Behaviours Analysis (the specific mix of activities will depend on the specific working contexts, roles and "entry" profiles) can be as follow:

- identify the eventual vulnerability and its main drivers/dimensions (that is critical both in the technical and relational dimensions, especially if not face to face)
- customise the information to be given according to the target (before the "advising" specific ones). If the HEA acts in a contact centre institutional or dedicated to bonus/incentives and so on, this step/activity can be standardized
- gather information through interviews, observation, measures, review of documents and data available (household components: habits / time slots / special needs / etc...)
- deliver questionnaires (in case of front-end workers) to users to identify some specific energy habits, such as type of heating or cooking they use, etc. If not front end this can be retrieved through a general conversation
- identify energy consumption points in a household /family unit
- analyse the house and electrical appliances
- collect supply contracts and energy transfer & interpret domestic fuel cost data using reference materials

- analyse consumption history and ordinary/extraordinary maintenance interventions
- analyse habits and special needs (e.g. biotechnology).

Therefore, the **main relevant knowledge, skills and competences** to be acquired and/or valorised for these activities and sub-activities are related to:

- Ability to analyze the context of the vulnerable consumer;
- Ability to observe, measure, analyse and synthesis;
- Ability to adapt to situations;
- Technical knowledge on:
  - energy system with special reference to: system structure and actors; energy market, retail system; home energy uses; energy bills, tariffs structures; services available in the market;
  - social system and services and vulnerability and vulnerable consumers features. Special focus on energy poverty: causes, effects how these can be minimised; identifying those at risk of energy poverty; sign-posting householders to appropriate support; heating systems and controls.
- Communication skills and competences (also written, phone, ICT mediated) both as basic skills (writing, literacy, numeracy, presentation, organization, computer skills and so on) and relational ones.
- Relational skills – with special reference to empathy and trust building - for all contexts in order to carry out the very first "technical" tasks by the HEA. It's important to keep in mind that HEA need to communicate from the very first approach with vulnerable consumers on technical / difficult issues in a very easy / user friendly manner and communication with vulnerable consumers is in general even harder due to the low skills and/or mistrust. The HEA must therefore develop emphatic competences.

Regarding the **technical skills/competences,** HEA employed in "technical working contexts" and/or belonging to those contexts usually already have these knowledge that only need to be updated (for example on ASSIST incentives databases). Basic and "wider" knowledge needs to be transferred in the cases of HEA "social working contexts" and, depending on the specific occupation, in the "institutional working context". On one side it is not possible to provide strong technical skills and competencies (both on energy and social topics) to an audience with so different entry levels (professionals approaching social system and vulnerable consumers; social / consumers operators approaching energy system). On the other side, providing strong technical skills to the HEAs would then overlap their profile with other existing technical professional profile (such us the energy advisors) whilst, as highlighted within the "role" section, it is more likely that the HEA works in team and/or as support other profiles in the cases of more complex energy behaviour analysis. On the contrary, HEA employed in "technical working contexts" and/or already belonging to those

contexts needs to acquire the second set of basic knowledge supporting a proper first contact, informative action and first level behaviour analysis.

3.2.3 Energy saving check-up and support

HEAs should also support vulnerable consumers to take up energy saving behaviours and interventions (starting from the "zero cost" ones).

In order to define borders and sub-activities of the HEA supporting action, it is crucial to distinguish between supporting vulnerable consumers in improving energy saving and energy efficiency. The second one being more related to complex and costly interventions and therefore requiring deeper and more technical knowledge and competences which will not belong to HEA, especially if related to the social working context.

Within the "social" working context of the HEA (but not exclusive) the energy saving check-up and support activity might be closer to an **awareness raising action on energy saving** more than an expected energy efficiency impact. It also depends on the vulnerability dimension (for example if economical, the support action will be limited mainly to behaviour awareness).

The **monitoring of the support service** has also been underlined (especially by social actors, stressing the need of continuous, customised and "simplified" training). Leveraging on the Belgium HEA qualification, certified by the Flander legislation and considering the high differentiation of HEA working contexts and targets, it could be useful, once the initial training and networking has been accomplished, to foresee two level of audit, as follow:

Follow-up scan type 1 (for VC with really high energy bills)

Suggestion of additional modifications to the house/appliances

Additional installation of small energy saving materials

Give information about how the free energy market works and guide vulnerable consumers to the 'V-test' (where you can test, based on your energy consumption and location which energy provider is the cheapest)

Follow-up scan type 2

People who have the intention to renovate: insulation of the roof, new energy-efficient windows, energy-efficient heating

More specifically **main activities/sub-activities** have been identified in:

- Measuring the energy use and energy efficiency of a household (overview of energy use in the home; benefits of energy efficiency; Measuring energy use; Reading meters (include smart meters); etc.);
- Identify the potential to improve energy efficiency in a range of dwellings and action plan to reduce the energy consumption of vulnerable consumers;

- Realising an energy audit as a "simplified energy check-up" including the identification of improvement interventions also in relation to the use of renewable energy source
- Identify the efficiency and appropriate use of heating and hot water systems and the functions of the controls
- Delivering interesting contacts and list of resources;
- Implementation of free 'energy saving package and/or eventual equipment/tools implementation to monitor and optimise energy consumption (e.g. radiator foil, LED lamp, water saving shower head, …);
- Analysing energy bills and payment options - Comparing and switching tariffs and/or giving advice on energy optimization contract with supplier;
- Identifying the funding/economic support for vulnerable consumers, incentive mechanisms and submission of financing requests - giving "bureaucratic" support in contract changes and/or incentives/bonus access;
- Post-intervention monitoring.

Main relevant skills and competences, both technical and communication, to be acquired / valorised are:

- Ability to classify and highlight the relevant uses of energy;
- Ability to carry on the simplified energy check-up that, in turn, call for energy consumption analysis skills;
- Competences related to a "functional analysis" for the consumer typology
- Ability to calculate energy savings and efficiency improvements;
- Competences related to the proposition of opportunities to improve energy efficiency;
- Knowledge and skills related to the identification and access to funding opportunities (incentives, bonuses, ….);
- Relational Skills and emphatic competences.

Informative action also responds to a general misunderstanding of the existence and role of the different "energy actors" that is quite common among consumers and vulnerable consumers. Finally, informative action can be aimed at identifying the vulnerability main drivers/dimensions and, so, to better customize the information and the following activities.

3.2.4 Communication and advice to consumers

A third activity area, transversal and supporting also the first two ones, refers to the overall communication process with (vulnerable) consumers (one-to-one and collectively).

Main **activities/sub-activities** have been identified in:

- Advise people on their specific questions about energy use and renovation (face to face and also phone/mail…)
- Advise on appropriate use of heating and hot water systems (and on how to record gas and electricity consumption and work out costs)
- Advise on general energy information, like how to interpret cost data, switch supplier and what type of tariff to choose
- Inform clients of ways of paying for gas and electricity
- Energy saving behaviours support, such us
  - ***behavioural tips***: how to lower the energy consumption (e.g., how to avoid condensation and how to take remedial action where condensation dampness exists and so on);
  - make a **personalised report** for the vulnerable consumers with more practical tips
  - preparing and delivering "**Family Energy Guidelines**"
- Valorise effective interaction among stakeholders
- Promote peer to peer interaction
- Support the creation of Purchase Groups
- Organize meetings and workshops (as well as individual/group home visit) aimed, for example, to improve knowledge and reading of energy bills and to impact on awareness raising on (energy) sustainable behaviour
- Realize "practical guides (brochures) for families which are proposed as effective tools for the education of the rational use of energy in the domestic field
- Prepare informative materials, presentations or other communication tools such as leaflets, videos, ….

Main relevant skills and competences to be acquired and/or valorised are mainly relational, although supported by specific technical knowledge and skills. More specifically:

- Communication skills and competences (oral, listening and written)
- Communication with technical and non-technical personnel
- Event planning and organization
- Knowledge of purchasing groups
- Empathy
- Easily approachable personality
- Social intelligence.

3.2.5 An integrated view on the HEA activities and competences areas

A comprehensive view of all the evidences collected by the national reports in terms of HEA's activities (and sub-activities) and competences (knowledge, skills and competences) for each of the three main HEA action areas is reported in the table below. The HEA competence have been articulated in terms of modular system correlated to the activities ones in order to contemporary valorize a common schema and the national diversity.

The modular approach employed in identifying and describing the HEA activities and sub-activities as well as related competences required, represents the conceptual and operative frame for the definition of the HEA training and action processes.

	Activities	Knowledge, skills and competences
Energy behavior analysis	• Identify the eventual vulnerability and its main drivers/dimensions • Customise the information to the target • Gather information (questionnaires, interview, observation, data-review, …) • Identify energy consumption points in a household /family unit • Analyse the house and electrical appliances • Collect supply contracts - interpret domestic fuel cost • Analyse consumption history and ordinary/extraordinary maintenance interventions • Analyse habits and special needs (e.g. Biotechnology)	Technical knowledge on sector with special reference to: • energy system and market • retail system • home energy uses • energy bills and tariffs structures • services available in the market • renewable energy solutions, costs and funding (basics)
		Technical knowledge on social system with special reference to: • social system structure and services • vulnerability dimensions and features • fuel poverty (causes/effects and policies/actions)
		• Ability to analyze the context • Ability to observe, measure, analyse and synthesis • Ability to adapt to situations • Communication & relational skills and competences
Energy check-up & support	• Measure the energy use and energy efficiency of a household • Identify efficiency/appropriate use systems • Realise a "simplified energy check-up" • Deliver interesting contacts and list of resources • Implement energy saving package/tools to monitor/optimise energy • Analyse energy bills and payment options • Energy saving behaviours support, such us: "behavioural tips" on how to lower the energy consumption • Compare and switching tariffs and/or giving advice on energy contracts • Identify economic incentive mechanisms and submission requests	• Ability to classify and highlight the relevant uses of energy • Energy consumption analysis skills • Ability to carry on the simplified energy check-up • Ability to calculate energy savings and efficiency improvements • Competences related to a "functional analysis" for the consumer typology • Competences related to the formulation of opportunities to improve energy efficiency • Knowledge and skills related to the identification and access to funding opportunities (incentives, bonuses, ….)

Communication and Advise to Consumers	• Advise on general energy information and on specific questions • Advise on appropriate use of systems • Inform on ways of paying for gas and electricity • Communicate energy saving tips and behaviours • Prepare personalised reports and/or "Family Energy Guidelines" • Promote Peer to peer interaction • Support the creation of Purchase Groups • Organize meetings/workshops • Realize guides/brochures • Prepare informative materials, presentations or other communication tools • Valorise effective interaction among stakeholders	• Communication skills and competences (oral, listening and written) • Communication with technical and non-technical personnel • Event planning and organization • Knowledge of purchasing groups • Empathy • Easily approachable personality • Social intelligence • Communication skills and competences (also written, phone, ICT mediated). • Writing skills (presentations, …) • Relational skills (empathy, effective communication, ….) • Competences related to the proposition of opportunities to improve energy efficiency

3.3 HEA Training

For all HEA "occupation" and working contexts defined within the "role" section and the related "activities and competences", the need of defining and delivering (and constantly updating) effective training programs has been strongly highlighted. Starting from the HEA requirements, together with evidences collected from existing training and resources carried out by partners, a **dedicated and modular ASSIST program has been built**. Employing a common ASSIST modular European based training enables to guarantee the customization of the course (in terms of modules undertaken) according to the HEA background/entry level (unemployed, vulnerable consumer, social operator, help desk operator, and so on) and working contexts (social services, help desks, social housing and so on). To this extent, matrixes correlating roles, activities and training modules are proposed in the last paragraphs.

3.3.1 Training targets

In each country **75 HEAs will be trained (expect in UK where 6 HEA will be trained)** and the mix of the participants of the training course, future HEA figures, will vary from country to country, in terms of typology of targets involved (in terms of entry level and potential occupational context) and relative numbers.

Although the quantitative and qualitative differences between countries of the training strategy related to the type of the HEA, it is important to underline that in each country also **vulnerable consumers** will undertake the ASSIST training for the HEA in order to activate a "peer to peer" support action methodologies.

As the vulnerable consumers who will undertake the HEA training may be people unemployed professionals, social housing householders, volunteers and so on, it is clear

that their entry level and training need differ largely. Therefore considering the different "typologies" of vulnerable consumers involved in the diverse countries (and within the same country) the ASSIST training for the vulnerable consumers will be built and delivered according to the overall country strategy defined by the partners.

Within the national training guidelines (D3.2) the specific mix of targets involved as well as the relative training programs will be described. A special focus on training customisation will be made in each country with reference to the programs dedicated to vulnerable consumers (in terms of training hours, methodologies and learning resources).

3.3.2 Building HEA modular training program: the frame

In line with the desk and the in-field the ASSIST HEA training course has been built keeping in mind the following important points:

- Assume a **modular approach** to enable the fruition of the training according to the background (i.e. entry level) and potential working contexts;
- Provide a **differentiate and customizable range of training activities**. As the ASSIST training course represents the first opportunity to provide future HEAs with all the information and training needed to be able to support vulnerable consumers, it is therefore important to illustrate all the range of activities they may undertake. In the training courses delivered within the ASSIST project, the partners may define the national HEA course keeping in mind the specific activities which the HEA will carry out within the ASSIST Action;
- Foresee a **constant updating** of knowledge (both on energy and social topics);
- Employ a **mix** of training methodologies between presence / distance / on-the-job learning, for example:
  - for the relational competences and the practical activities a traditional learning methodology may be more effective.
  - for supporting vulnerable consumers, on the job training methodologies may be effective;
  - for energy check-up, incentives / funding opportunities and communication techniques may be more effective through distance learning.

  Distance learning can facilitate the fruition of the training thanks to the self management of the **training time** as well as having a wider geographical outreach;
- Define **effective strategies to involve vulnerable consumers** (both in training and as final target of the support of the HEAs). Recruiting vulnerable consumers to give advice can be difficult as many lack the confidence to provide advice. In the European project TRIME (Trias Mores Energetica)[4], the training was most effective if addressed to the vulnerable consumers who wanted to connect the community and those who were already socially active;

[4] http://www.trime-eu.org/

- Building on the lessons learnt of project TRIME, **performance targets** must be considered during the planning for training due the difficulties encountered in asking the volunteers to complete the data measurements;
- Foresee **rewards and awards,** positive motivator (especially for volunteers) and effective engagement strategy. This also includes the "**recognition / certification"** of the training / action (e.g. in UK course should be **CPD Marked** and volunteers committed for an extended period of time could potentially complete the formal NEA course to get Level 3 accreditation).

3.3.3 Building HEA modular training program: the learning outcomes

Starting from the analysis of HEA's roles, activities and competences clustered in the three main areas (analysis, check-up, communication), a modular system of learning outcomes and training modules is defined.

Consistently with the three activities, three main competences areas are required to the HEA: **technical, social, relational.** Knowledge and skills are required on energy technicalities and social system as well as vulnerability issues. Particularly, training needs on energy issues are specifically high for people that already are skilled on social issues whilst training needs on social issue are high for people that are knowledgeable on energy issues. Additionally, training needs on behavioural aspects on energy consumption and strong relational competences are needed for both (operators with energy and social skills). In all contexts the need of delivering dedicated training is stressed as crucial point, with special reference to the development of proper "relational", communication, emphatic competences when dealing with consumers and vulnerable consumers. The **need of emphasizing the relational dimension (supporting an empathic relation with consumers**) has been highlighted, with different focus by all actors together with the relevance of the technical dimensions (both in terms of technical advising role and of required technical competences).

Additionally, one of the two dimensions (social vs technical) should be present as starting competence / experience. It might be very difficult to train an unemployed with no experience / skills in neither of the two main dimensions to become an HEA.

The weights of the technical, social and relational dimensions within the course has been very challenging due to the different perspectives of the various stakeholders due to the needs of:

- **integrating contemporary both technical and communicative / social professional dimensions**, also in terms of ability of delivering customised "advising services" to consumers and vulnerable consumers based on the "empathic competence" which characterises the ASSIST HEA from other existing consumers services;
- **defining the "basic" technical skills and first level advising role** for the HEA in order to eliminate in-depth technical knowledge (which may constitute a barrier for people with a social background or for vulnerable people willing to deliver energy advice on a "peer

to peer" basis and at the same time not overlap the HEA profile with other specific professional profiles already existing (i.e., energy auditor, energy manager and so on).

Further a special focus on the need to balance the three HEA dimensions (technical - social - relational) needs to be taken into account when analysing the role of HEA within **contact centres**, be it of contact centres energy companies (or agencies); contact centres of consumers associations; contact centres of public institutions (such us the ones of National Energy Authorities). In contact centres, the communication is mainly via telephone and therefore the communication and emphatic relation becomes more difficult as it is not easy to identify on the phone a vulnerability condition and its features (economic, social, or other dimensions). In these cases the technical and relational skills of HEA must be highly developed to carry out **phone and written communication**.

Last but not least, **training in the following areas** may also be crucial especially if the trained HEA will be working in specific sectors: health and safety; safeguarding; data protection and confidentiality and data systems linked to the programme; company policies and procedure. The choice of including and how these topics in the ASSIST HEA course will be detailed in the single national training guidelines (within the general ASSIST training course hours have not been allocated for these topics).

The following 3 paragraphs describe the common "ASSIST HEA - Introductive module", the overall HEA modular program, a table correlating HEA roles and working contexts with HEA training modules.

3.3.3.1 ASSIST HEA Introductive module

A common "ASSIST HEA - Introductive module" will be set at the beginning of the course, to illustrate all the trainees (whatever their background and knowledge and skills) to:

- Illustrate the **ASSIST model** based on the figure of the HEA: HEA training, network and action;
- Present the ASSIST training program and training platform;
- Present ASSIST supporting resources such as: Project factsheet, communication to consumer (domestic energy related informative resources targeting consumers); HEA ASSIST action (resources to be used by the HEA in delivering advice to vulnerable consumers; **HEA** Networking (resources on the functioning of the network and its advantages).

The introductive module may last from 2 to 4 hours and may be delivered **in presence** or **distance** (i.e. by webinar).

3.3.3.2 HEA Learning Outcomes / Training program

A modular system of learning outcomes and training modules has been defined and the following table represents the general structure of ASSIST HEA training course which will be adapted to each national context and detailed in the **National Training guidelines (D3.2).** More specifically, the following table reports:

- **Learning outcomes** related to the knowledge, skills and competences requirements;
- **Modules / contents** of each learning outcome and, for each a **timeframe duration range**. Considering the average duration, the overall ASSIST HEA training program will last 36 hours (plus 4 hours of the introductive module). In each country, according to the specific features of target (competences entry level) and contexts (sectoral and occupational), the module length will be defined.

Activities		Knowledge, skills and competences	Learning outcomes/ modules/contents	Hours
ASSIST HEA Introductive Module		Illustrate the ASSIST model based on the figure of the HEA; Present the ASSIST training program and training platform; Present ASSIST supporting resources		**4 (2-4)**
Energy behaviour analysis	Identify the eventual vulnerability and its main drivers/dimensions Customise the information to the target Gather information (questionnaires, interviews, observation, data review, …) Identify energy consumption points in a household /family unit Analyse the house and electrical appliances Collect supply contracts and energy transfer & interpret domestic fuel cost Analyse consumption history and ordinary/extraordinary maintenance interventions Analyse habits and special needs (e.g. Biotechnology)	Technical knowledge on energy sector with special reference to: ▪ energy system and market ▪ retail system ▪ home energy uses ▪ energy bills and tariffs structures ▪ services available in the market	**Basic Knowledge on Energy Sector** The energy sector (basic knowledge on the sector structure; focus on the retail system and on the main actors involved, including the authorities and consumers help desks; services available in the market) Legislation and regulations (general framework of relevant: legislation on energy supply; regulation on energy trading and energy policies, including EU and national policies; energy bills and tariffs structures) Energy consumption and Energy saving (basic knowledge on energy consumption statistics and paths; introduction to energy indicators and energy efficiency indicators) Home energy uses (Lighting, gas….) systems, household appliances and devices	**6-12**
		Technical knowledge on social system with special reference to: ▪ social system structure and services ▪ vulnerability dimensions and features	**Basic Knowledge on Social System and Vulnerability** The Social System (basic knowledge on: social system structure and actors; third sector and	**6-12**

		▪ specific regulation to protect vulnerable consumers ▪ fuel poverty (causes/effects and policies/actions)	social services; general framework of relevant legislation and regulation) "Consumers" system (association, services, regulation) Social Programs, Policies and Actions (basic knowledge on existing programs, policies and interventions, main actors and procedures related to the services access (including a first overview of incentives, funding and supporting services for social system targets) Vulnerability and Energy Poverty (main framework on vulnerability and its features both at EU and National levels with a focus on energy poverty, including main statistics of the phenomenon, targets included, vulnerability relevant dimensions; health and social results of vulnerability) National/Local existing measures, protocols, … to protect vulnerable consumers (specific regulations)	
		Ability to analyze the context in which operate Ability to observe, measure, analyse and synthesis Ability to adapt to situations Communication/relational skills and competences	**Transversal** (cognitive and behavioural) See "**Communication and advise to consumers"** competences and learning outcomes area	
Energy check-up & support	Measure the energy use and energy efficiency of a household Identify efficiency/appropriate use systems Realise a "simplified energy check-up" Deliver interesting contacts and list of resources Implement energy saving package/tools to monitor/optimise energy Analyse energy bills and payment options	Ability to classify and highlight the relevant uses of energy Ability to carry on the simplified energy check-up that, in turn, call for energy consumption analysis skills Ability to calculate energy savings and efficiency improvements Competences related to a "functional analysis" for the consumer typology Competences related to the formulation of opportunities to improve energy efficiency Knowledge of purchasing groups	**Refreshing communication and action resources** **Energy Behaviour Check-up** Energy consumption habits Domestic energy consumption Introduction to domestic energy check-up How to develop a simplified check-up First level monitoring activities and tools **Energy Behaviours Support** Energy behaviours and tips Contracts - Energy bills Analysis	**14-30**

	Compare tariffs and switching mechanisms and tariffs and/or giving advice on energy contracts Identify economic support/incentive mechanisms + submission of financing requests	Knowledge and skills related to the identification and access to funding opportunities (incentives, bonuses, .); **Specific Action(s) related knowledge skills and competences**	Supporting Energy "Funding" Incentives, Bonus and access procedures Best Practices and Incentives Database **Additional specialised contents** Zero cost interventions Purchasing groups Renewable energies for vulnerable consumers **Specific Action(s) related training/protocols of action(s)**	
		Relational skills and emphatic competences	**Transversal** (cognitive and behavioural) See "**Communication and advise to consumers"** competences and learning outcomes area	
Communication and Advise to Consumers	Advise on general energy information and on specific questions Advise on appropriate use of systems Inform on ways of paying for gas and electricity Energy saving behaviours support, such us "behavioural tips" on how to lower the energy consumption; personalised reports; "Family Energy Guidelines" Promote Peer to peer interaction Support the creation of Purchase Groups Organize meetings/workshops Realize guides/brochures Prepare informative materials, presentations or other communication tools Valorise effective interaction among stakeholders	(Oral, Listening and Written) Communication skills and competences Communication with technical and non-technical personnel Event planning and organization skills Empathy Easily approachable personality Social intelligence Relational skills (empathy, effective communication,….) Competences related to the proposition of opportunities to improve energy efficiency KSC requirements from activities related to the previous two activity areas: Ability to analyze the context in which operate Ability to observe, measure, analyse and synthesis Ability to adapt to situations Communication skills and competences (also written, phone, ICT mediated) Relational skills and emphatic competences	Communication and relational competences Communication skills and competences (also written, phone, ICT mediated). Relational competences (from self awareness and management to problem solving and not verbal communication) Social intelligence and emphatic competences Oral, Written and "distance" communication skills Promoting and organizing meetings and events	**10-20**

Annex 1 – Partners Guidelines

HEA qualification schema definition - GUIDELINES

1. OVERVIEW and AIMS

1.1 Project scope and goals

ASSIST is a 36-months European 'market activation and policy orientation' project to tackle fuel poverty and support vulnerable consumers. It intends to actively engage consumers in the energy market and positively change behaviour in relation to energy consumption and to influence design of policy at all levels to tackle fuel poverty issues.

Based on the conclusion of the Energy Citizens' Forum and of the European Vulnerable Consumers Working Group, the project intends to combine activities addressing both energy and social dimensions as fuel poverty is not only an energy issue nor can it be tackled in isolation of the bigger issue of poverty. More specifically, ASSIST project strategic aims are to contribute to:

- tackle fuel poverty;
- tackle the main barriers of the energy market faced by vulnerable consumers;
- support vulnerable consumers to be more efficient with their domestic energy consumption (electricity and gas).

To fulfil its goals, the project lifecycle foresees very diversified, but correlated, research, networking activities as well as in-field actions, consistent with the relevant national and European-wide scenarios. ASSIST promotes the creation, networking and action of an innovative professional figure to support vulnerable consumers in their domestic energy consumption, the Vulnerable Consumers Energy Advisor (HEA), denominated "Household Energy Advisor (HEA)".

1.2 HEA Training. The WP3 goals overview

The third work-package aims at:

1. Building the HEA qualification schema grounded on both national and European desk and in-field analysis (as illustrated in these guidelines and more specifically in Paragraph 3);
2. defining the HEA training program built on learning outcomes and, for each learning outcome, contents and methodologies (including the distance learning options). This approach, consistent with the European training, profession and learning frames and methodologies, enables both a personalised fruition of the learning processes according to the level of the single trainee (in terms of knowledge, competences, experiences, professional profile and so on) and also a national differentiation (job contexts, energy and welfare issues and frames and so on);
3. engaging at least 75 potential HEA and delivering to them the HEA training program.

1.3 Document aims and structure

The present document illustrates the common guidelines to prepare the HEA qualification schema (D3.1) which, together with the relative training program (contents, methodologies and resources), will be built on the evidences gathered through both national and European desk and in-field analysis:

1) previous project activities, mainly on results from national and European context analysis and market survey (WP2) and
2) dedicated research activity to be carried out at the beginning of the WP3:
   - desk research to identify similar professional profiles both within the European and National Qualification Frame[5] and within other projects (mainly within the ERASUS+ programme);
   - in field research through interviews to collect information from relevant stakeholders representing both energy, social and institutional actors.

These guidelines focus only on the WP3 research activities (desk and in-field) by providing the necessary information (input and expected output) to define the profile of the HEA and prepare the relative HEA Qualification Schema:

1) The **inputs** to build the common *HEA Qualification Schema (D3.1)*, provided in the present documents, are:

Structure and contents of the HEA qualification schema and brief overview of the approach	Par. 2
Preliminary HEA identikit	Par. 3.1
Guidelines to carry out desk research	Par. 3.2
Guidelines to carry out in field research	Par. 3.3
Communication to engage stakeholders and collect their expression of interest	Annex 1
Guidelines to interview stakeholders	Annex 2
Template of HEA national context report to be filled in by partners	Annex 3

2) The expected **output** to be prepared by the partners is the *HEA National Context Report* which will be the basis for the preparation of D3.1 *HEA Qualification Schema.*

2. THE HEA QUALIFICATION SCHEMA: STRUCTURE, CONTENTS AND APPROACH

The HEA Qualification Schema (D3.1) represents the document describing the job and competences characteristics of the HEA in terms of:

- Jobs and roles;
- Activities;

[5] The EQF is the European-wide qualifications framework which joins the qualifications of different EU members together which enables to have a common European frame of qualifications valid in different European countries and thus easier to understand (https://ec.europa.eu/ploteus/content/descriptors-page)

- Knowledge, skills and competences (KSC);
- Training program, consistent with the KSC required by the activities to be undertaken in the jobs of the HEA.

The HEA qualification schema will describe the HEA occupation, as defined within the European frame of ESCO ("European Skills, Competences, Qualifications and Occupations" a European 2020 initiative by DG Employment, Social Affairs and Inclusion and DG Education and Culture of the European Commission in collaboration with stakeholders and with the European Centre for the Development of Vocational Training – Cedefop https://ec.europa.eu/esco/portal/escopedia/Occupation): "an occupation is a grouping of jobs involving similar tasks and which require a similar skills set. Occupations should not be confused with jobs or job titles. While a job is bound to a specific work context and executed by one person, occupations group jobs by common characteristics".

The structure of the HEA qualification schema is reported below.

Jobs/Roles	***The first section describes the HEA "jobs" or "roles" in terms of:*** 1) **Output** and/or **impact** generated: the **mission** of the occupation or how the occupation contributes to the achievement of the core goals of the business. According to the main scope defined in the project proposal, the HEA's mission can be defined (to be confirmed and/or modified by the research findings) as follow: ***Occupation = Household Energy Advisor (HEA)*** ***Description = HEA delivers information, support and advice to vulnerable consumers in order to improve energy consumption behaviours and access to supporting measures/incentives.*** 2) The **working context** of the HEA occupation in terms of **sectors, fields, areas,** which includes all the various sectors potentially interested in employing / training an HEA and the role of the HEA in relation to other existing professional figures. The possible range of sectors potentially relevant for the HEA action / employment (identified in the project technical annex, to be confirmed and/or modified by the research findings), such as: 1. **Energy** with reference to representative organizations, authorities, utilities, energy agencies, etc.; 2. **Social** with reference to social operators associations, social departments of universities, consumer associations, charities (red cross, caritas, etc.), housing associations; 3. **Institutional** with reference to municipalities - social department, regions, ministry, etc. A fourth sector that can also be investigated is the **energy market** with reference to the market actors - **utilities, DSOs and energy companies in general,** which could be interested on a "Corporate Social Responsibility" perspective to improve their services to consumers by

	employing an HEA and/or training their employees employed within the network of consumers services units. The role of the HEA occupation in **relation to other occupations**, i.e. possible relations with other jobs for each of the working contexts investigated within the previous paragraphs. For example: ***Occupation = Household Energy Advisor*** ***Description = HEA work together in a team with civil servants within the occupational fields of social department delivering assistance to family and vulnerable target groups as well as with social operators in delivering social services*** 3) The potential integration within the national and regional qualification frames. More specifically, according to the research evidences, the HEA qualification schema will also indicate if the defined HEA profile can be integrated within the regional/national qualification framework as a whole (new profession) or as professional area/competences/role to be developed in existing professional profiles. 4) A brief overview on the **main tasks/activities related to the HEA profile** (the detailed description of the HEA activities is in the second section).
Activities	The second section describes the HEA activities articulated in terms of modular system of activities, in order to contemporary valorise a common schema and the national diversity. Although the differences of activities that might arise in the diverse contexts of action (energy Vs. social Vs. institutional), the main HEA activities can be clustered into three main areas: • energy consumption behaviour analysis • energy – social assistance • advising and communication to consumers. The evidences arising from WP2 and from dedicated desk and in field analysis carried on within WP3 (see next paragraphs) will allow to deepen/list/detail the sub-activities per each of the three areas and to differentiate action contexts. The modular approach employed in building, identifying and describing the HEA activities and sub-activities represents the conceptual and operative frame for the definition of the HEA training and action processes (as integrated with the identification of the required competences, articulated and specifically referred per each activity – see part 3 of the schema).
Knowledge, skills and competences	The third section articulates and describes the mix of knowledge, skills and competences required to carry out the various activities of the HEA (as described in the previous paragraphs). The desk and in field research will allow to identify the relevant mix for each activity. On these basis, the KSC (knowledge, skills and competencies) matrix will be built correlating activities, learning outcomes and KSC.

The training program	The fourth section drafts the HEA training program based on the matrix built within section 3 and the evidences collected by the partners on already existing training programs and/or learning resources (see paragraph 3 on on-desk and in-field research). The definition of the training program will consist in the identification of: - learning outcomes, learning modules and units; - methodologies, contents and learning resources per each module/unit. In this section, the distance learning solutions will also be described; - the training evaluation system focusing on participants "reaction" and learning achievements; both in itinere and ex post, evaluation methodologies, tools and metrics will be described. The delivery of the HEA training certificate will be detailed (considering also its validity within the ECVET system). The approach employed, consistent with the main European frames and methodologies relevant for building and valorising common European job and learning markets and "spaces", will be based on a modular composition of the activities systems (clustering roles, activities and sub-activities) and of the related learning outcome (or competences required).

The "HEA Qualification Scheme (D3.1)" will be prepared by AISFOR on the bases of the partners' contribution as described in the following paragraphs; it will be prepared in English and then translated by the partners in all the project languages.

3. BUILDING THE HEA QUALIFICATION SCHEMA (D3.1)

Based on the ESCO and EQF approach, ASSIST will:

- build the HEA qualification schema according to the existing national occupational frames, by comparing the results of the national and European contexts;
- develop a modular profile, guaranteeing the potential application in diverse "occupation" context (sector Vs. geographic).

The building of the HEA Qualification Schema (D3.1), according to the approach and schema reported in the previous paragraphs, will be based on:

1) Preliminary HEA identikit, according to ASSSIST technical annex (par 3.1);
2) Results of the desk research carried out at each national level as well as at a wider European level (par 3.2);
3) Results of a dedicated in field research activity (par 3.3).

1.4 Preliminary HEA identikit, according to the ASSIST technical annex

Based on the contents of the ASSIST technical annex, an initial HEA identikit has been drawn to be used as starting for the research activity in WP3 (a common frame and "guide" for the analysis of the national profiles within the desk research and to introduce the HEA professional profile to the stakeholders within the in-field research).

The identikit may be modified by the partners as they consider more appropriate and efficient according to the national contexts and to the specific use of the preliminary identikit.

It is also recommended the identikit is translated in the national language to facilitate its understanding by the stakeholders addressed in the WP3 research activities.

The HEA is a person trained and also initially professionally guided within the ASSIST project to support vulnerable consumers to tackle energy poverty.

He / she will have direct contacts with the target group (vulnerable consumers) in order to provide energy efficiency support to vulnerable consumers and more specifically to energy poor consumers. The HEA delivers information, support and advice to them in an easy and comprehensive and practical manner in order to improve their energy consumption behaviours and also facilitate access for them to supporting measures/incentives. More specifically, HEA roles and activities include:

- ***energy consumption behaviour analysis,***
- ***energy – social assistance,***
- ***advise and communication to consumers.***

He/she may work within energy, social and institutional organizations and work contexts as well as for the private energy market actors such as the energy companies.

The HEA is a person who has undertaken a specific training course on energy – social – communication issues specifically built and delivered in order to provide the HEA with the knowledge, skills and competencies to support vulnerable consumers to have more efficient energy consumption behaviours. The ASSIST national partners guarantee on the quality of the HEA training in their country and of the successful training of the qualified HEA.

Once the trainee has successfully completed the training course, he / she will become a qualified HEA and as such member of the National network of HEA which will enable he / she to:

- have access to the continuous training provided within the ASSIST project,
- share experiences and information with the other members of the HEA National network, with the lecturers and trainers of the course and with the main National experts on energy poverty (members of the National Steering Committee),
- gain experience by actively delivering the ASSIST pilot project, ie a support initiative defined by the ASSIST national partners in collaboration with the main National energy poverty experts to tackle energy poverty.

1.5 Desk research

The desk research aim is twofold:

1) The HEA profile definition will be based also on the EQF (European Qualification Frame) and the various National Qualification Frames(NQF). Partners will analyse at each national level the existence of professional profiles similar to the HEA within the national (or regional) qualification frame (NQF) – see below for more information - and, if present, the features of such profiles in terms of: <u>qualification level, occupation, role and work contexts, activities and, if available, the required skills set</u> (consistently with the first three sections of the Qualification Schema reported in par. 2).

   Partners are required to check the professional profiles within their national NQF, where the professional repertories described are articulated in terms of:

   - EQF level

- Sector/s
- Role and activities
- Learning outcomes and/or knowledge, competencies and skills systems
- Entry level, curricula and, eventually, certification system.

Partners will verify the characteristics of the profiles within the NQF and collect any existing professional profile/qualification schema similar to the HEA highlighting the common/similar role and activities and report them in the relative section within the National report (see annex 3)

Further to checking the existance of similar professional profiles within the NQF, partners should also check if any national projects (such as the ERASMUS+ projects) have addressed similar professional profiles and needs. In such case, partners are requested to highlight the common points with the HEA. In these cases, the profile description might not follow the common European / National Qualification Frame and it may be more difficult to identify the common points with the HEA.

⇨ The information collected by the partners, will serve for the identification of the ASSIST common points which will constitute the contents of the first two section of the HEA qualification schema (respectively: “Jobs and Roles” and “Activities”) - integrated with the in depth evidences gathered within the in field action.

In case the NQF qualification schema also report a detailed description of the competences required and/or the referrement to specific training paths, the information will be reported, respectively, into the second two section of the HEA qualification schema (“Competences” and “Training”).

2) Partners will analyse, at each national level, the existence of training courses, initiatives (including pilot/experimental projects) and learning resources on:

- social occupations, with focus on support to vulnerable consumers;
- energy efficiency occupation, with focus on delivering advice on domestic energy consumption.

⇨ The information collected will be reported within the second two section of the HEA qualification schema (respectively: “Knowledge, Skills and Competences“ and “Training Program”) - integrated with the in depth evidences gathered within the in field action.

The evidences (both on HEA profile/role and on the HEA training programs) of the desk research is integrated with the information collected/provided by the:

- national stakeholders during the in-depth interviews (task 2.5);
- Vulnerable Consumers Steering Committee (task 7.1);
- Stakeholders and/or VCSC during dedicated in field activities, as in the following paragraph.

3.1 In field research

The goal of the in-field research activity is to collect stakeholders' feedback in order to integrate the evidences of the desk analysis and:

- have a complete picture of roles, activities and competences of the HEA within the various potential occupation and job contexts;
- share the HEA profile definition process with all relevant stakeholders, so as to guarantee the goodness and robustness of the profile itself;
- involve and engage stakeholders so as to launch collaborations also the following training, action and networking activities as well as for project result sustainability.

3.1.1 Methodologies/activities

The methodology used for the in-field action will be mainly a **structured interview within direct meetings with the relevant stakeholders involved** (*see next paragraph*).

The guideline and the proposed structure of the structured interview is reported in *Annex 2*.

Direct meetings can be realised as:

- One to one meetings
- Small group meetings
- Focus group/Round Tables (also within wider meetings or events)

In case of small group interview or focus group/round table, the questions are meant to stimulate the debate among participants; in the opening session allow participant presentations and their interest to the project/HEA.

In case it is not possible to organise a direct meeting, also **distance communication** may be possible (phone call, skype, conference call and so on, better if in synchronous methodology and with document sharing tools).

3.1.2 Stakeholders to be involved

Partners will map, contact and interview different national stakeholders.

The table below reports a list of possible stakeholders and their potential interest in the ASSIST project which may be used by partners as starting point for the identification of national stakeholders to be involved in the WP3 research activities

Type of actor	Interest in ASSIST	Contact / Engagement strategy
Municipalities (social department)	Train social operators (WP3) and become members of the action (WP4) and deliver the action (WP5). Participate in VCSC (WP7)	Send presentation letter to person responsible asking for a meeting to illustrate and promote the project

Social operators associations	Insert the HEA training course within the training of social operators - initial training (university) and continuous training (accredit HEA training course) (WP3) and become members of the action (WP4) and deliver the action (WP5): Promote the HEA network to vulnerable consumers (WP6)	Contact university social departments / segretary of the national associations
Social departments of universities	See above	See above
Consumer associations	Complement the training of their operators with HEA module (WP3), participate in the HEA (WP4) and implement action (WP5). Promote the HEA network to vulnerable consumers (WP6). Participate in the VCSC (WP7)	Usually they already have a service to provide support to consumers on energy issues - contact the energy responsible person To work with local level structures
Charities (red cross, caritas, etc.)	They have compulsory training to complement with the HEA (WP3), Network (WP4), action (WP5). Promote the HEA network to vulnerable consumers (WP6)	To work with local level structures
Housing associations	Promote the action (WP5) and promote the network (WP6)	
Others, ….		

The mapping process may be common with the activities within WP2 and other work packages (WP4, WP5, WP6, WP7 and WP8). Partners will select, amongst all the national actors dealing with the issue of energy poverty, those who may provide valuable feedback for the definition of the HEA and will then contact interview them (according to the methodology they prefer, in presence or at distance, one to one or in small group).

In selecting the stakeholders to be involved, please keep in mind:

1) the opportunity to involve a balanced mix of **energy, social and institutional** actors (the specific selection depending on the national situation and potential) in order to maximise the relevant information to have a clear picture and job potential of the HEA role, activities and required behaviours and competences;
2) the actors involved within
   - the market survey in **WP2** (partners may choose to undertake jointly the two tasks with one or more actors)
   - the **VCSC building** (valorising the synergies and an active role throughout the overall process/project)
3) the opportunity of involving institutions/organizations (energy or social) that **might be interested in**:
   - sending participants to the HEA training courses;

- participating as “host” of the “ASSIST action”;
- valorising and multiplying the “HEA network”.

To maximise the impact of the interviews and the results collected partners may:

- Send an **email** to request the interview containing the description of the HEA and the form to express the interest of the stakeholder in participating in the project activities (*ANNEXES*
- *Annex 1: Communication to engage stakeholders and collect expression of interest),*
- Follow the **interview guideline** (Annex 2: Stakeholders).

Partner will then report the information collected within the HEA National Context Report (*Annex 3: Template of National Context Report to be filled in by partners with national context*). and send it to AISFOR which will then prepare the common “**HEA Qualification Schema**” (Deliverable 3.1).

4. TIMING

The desk and in field WP3 research action (as described in these guidelines) will take place from August to beginning of October.

The reports with the main conclusions will have to be sent to AISFOR on October 15.

In order to avoid delays in the conclusion of activities and allow the proper synergies among tasks and WPs, partners are encouraged to start planning actions together with the ones related to *WP2* and *VCSC.*

5. ANNEXES

5.1 Annex 1: Communication to engage stakeholders and collect expression of interest

The proposed text can be used (both as email text and as guideline to follow) when contacting and engaging the stakeholders for requesting the meeting/interview.

> *Dear …..*
>
> *we would like to involve you within a focused in-field research action we are carry on for the European project ASSIST web site.*
>
> *ASSIST is a 36-months European '<u>market activation and policy orientation</u>' project to tackle fuel poverty and support vulnerable consumers. It answers the H2020 "Consumers Engagement" call requirements to actively engage consumers in the energy market and positively change behaviour in relation to energy consumption and to influence design of policy at all levels to tackle fuel poverty issues.*
>
> *ASSIST intends to combine activities <u>addressing both energy and social dimensions</u> aiming at contributing to: tackle fuel poverty and the main barriers of the energy market faced by vulnerable consumers; support vulnerable consumers to be more efficient with their domestic energy consumption (electricity and gas).*
>
> *In order to fulfil its goals, the project lifecycle foresee research, networking and in field activities; among them, the creation, networking and action of an innovative professional figure to support vulnerable consumers in their domestic energy consumption, the Household Energy Advisor (HEA).*
>
> *To this extent we would like to benefit from your knowledge and experience in the field to collect precious suggestions and comments (or other activity as in par. 3.3.1) through an appointment – also on the phone. Your contribution will be very precious for this project activity to define roles, tasks and competences profile of this new professional profile.*

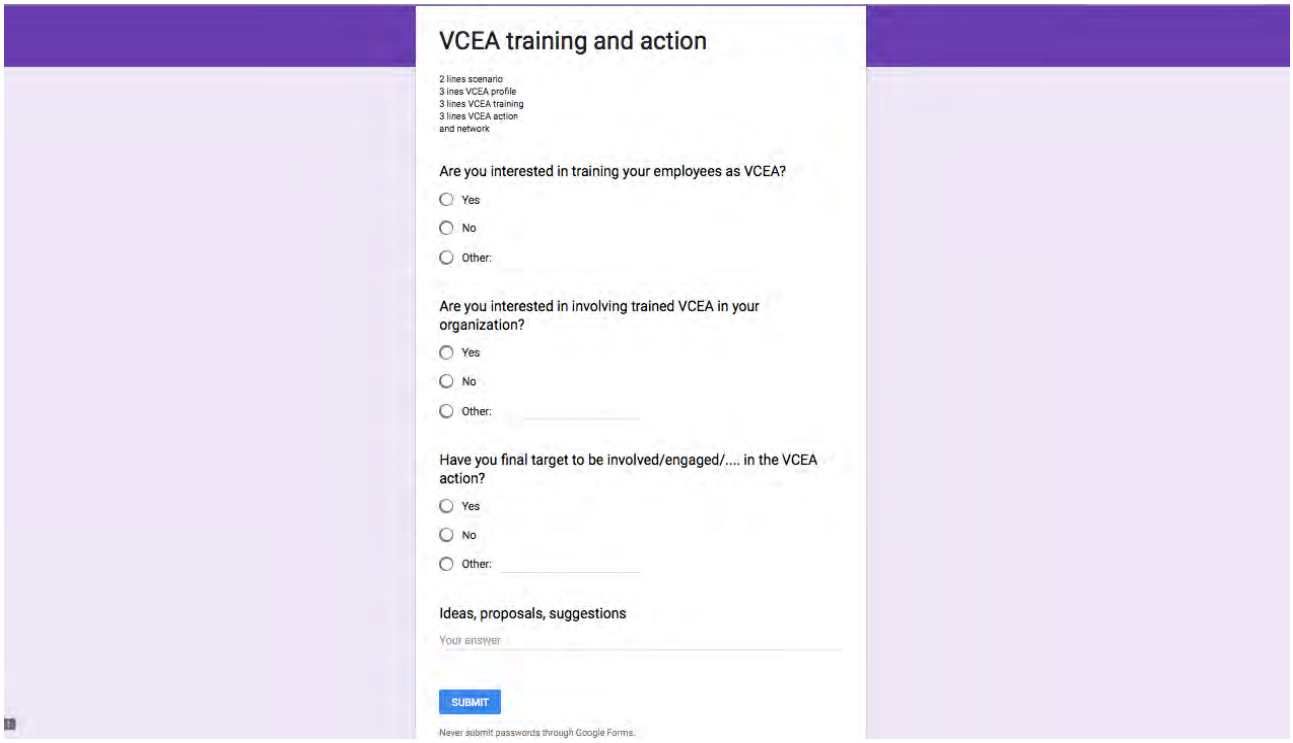
The activity to collect information on the profile and job of the HEA may be a good opportunity to verify the interest of the various stakeholders to actively participate in the overall "ASSIST process" (training, action, network) by asking them to express their interest on one or more of the various phases, for example using a google form in order to speed, harmonize and facilitate the delivery and the collection. To this extent, the email sent to the stakeholders may include also the following text:

> *Once defined and shared among partners a common HEA profile we will:*
>
> *- deliver a **training program** (also technology enhanced);*
>
> *- realize a dedicated **action** (where the trained HEA will meet, engage and support vulnerable consumers);*
>
> *- support the **HEA networking** in order to valorise mutual learning and the professional identity development.*

Please, fill the form you find at this link (XXXX) to express your interest in: training your employees as HEA and/or to involve trained HEA in your organization and/or to involve final target within the HEA action.

Here you find the link to the one done in English as a template.

https://docs.google.com/forms/d/1cmjjyxN8LXrBbiG1fHYDLUCPVXUnfv96yt8zVCEQtR0/edit



5.2 Annex 2: Stakeholders interview guidelines

Open the interview with:

- A refresh on the project and on the HEA dedicated in field action (following the brief presentation sent),
- refer to the expression of interest filled in with focus on his / her selected activities,
- remind aims and structure of the interview.

The interview will focus on the main qualification schema section (as in par. 2).

ROLE	*ASSIST proposes the development and valorisation of an innovative professional profile, the Household Energy Advisor (HEA). He/she delivers information, support and advising services to vulnerable consumers in order to improve energy consumption behaviours and access to supporting measures/incentives.*
1.	1.1 Are there any similar professional profile within your national/regional qualification frame? and/or within innovative/piloting national projects?

	1.2 If so, please describe them and/or indicate the main references. or 1.2 If not, do you think that the introduction of such profile can *contribute to tackle fuel poverty and the main barriers of the energy market faced by vulnerable consumers? and, more specifically, can contribute to support vulnerable consumers to be more efficient with their domestic energy consumption (electricity and gas)?* *1.3 If not, do you think that the HEA role and mission as expressed, can be played by any already existing professional profile (for example, social assistant or civil servants or consumer association advisor and so on – depending on the stakeholder interviewed)*
2.	2.1 If existing, which is the employment sector of such profile? 2.2 If not existing, which are the main relevant work contexts for HEA? Social, sector, institutions, ..? *Partners can list the proposed work contexts (par. 2) according to the stakeholder profile/sector.* *If interviewing a referent of* ***utilities and energy (distribution) private companies****, it might be relevant to ask their interest also a "Corporate Social Responsibility" perspective to improve their services to consumers by employing HEA and/or training their employees employed within the network of consumers services units.*
3.	3.1 Which are, if any, the other occupations/profiles that HEA can work in team with? *Per each of the relevant work contexts investigated within the previous paragraph*
4.	4.1 The HEA profile can be integrated within your regional/national qualification framework 4.2 If so, as a whole (new profession) or as professional area/competences/role to be developed in existing professional profiles? Please describe them and/or indicate the main references.
Activities and Competences	HEA main activities and required behaviours can be clustered into four main areas: - energy behaviour analysis - energy saving communication - Communication and advise to vulnerable consumers
1.	According to the HEA role and work contexts just shared, which are the main activities to be realised? 1.1 *Energy behaviour analysis* Please, indicate same examples of activity/subactvity. Which are the main relevant skills and competences to be acquired/valorised for these activities/subactivities? 1.2 *Energy saving communication* (including both technical audit and access to incentives) Please, indicate same examples of activity/subactvity. Which are the main relevant skills and competences to be acquired/valorised for these activities/subactivities? *1.3 Communication and advice to consumers* Please, indicate same examples of activity/subactvity. Which are the main relevant skills and competences to be acquired/valorised for these activities/subactivities? *1.4 Other* Please, indicate same examples of activity/subactvity. Which are the main relevant skills and competences to be acquired/valorised for these activities/subactivities?
Training	

1.	1.1 Do you know the existence of any specialised/focused training program relevant for HEA? If so, please indicate the references. 1.2 Do you think that can be useful to employ a mix of: - in presence. If so, for which competences? Please, furnish some suggestions for contents and/or learning resources that can be valorised. - distance. If so, for which competences? Please, furnish some suggestions for contents and/or learning resources that can be valorised. -ASSIST "action" (HEA pilot practical activities with consumers) methodologies and modules? Please, provide some suggestions for each.

Conclude the interview informing that his/her feedback and inputs will be taken into consideration for the

- HEA qualification schema (that will be sent back to him/her) as well as for setting and realizing the HEA training and action (remind or ask again for the expression of interest).

Also inform the interviewee of the networking (depending if he/her belong to the VCSC) and of the next event in your country.

5.3 Annex 3: Template of National Context Report to be filled in by partners with national context

The report aims to provide AISFOR with the necessary information on the national context in order to prepare the *HEA qualification schema*, it therefore needs to illustrate the actors involved, activities carried out and evidences collected per each section of the Schema.

Activities and Actors		
Activities realized	*Please, describe the;* - *activities carried out and methodology used (in presence or distance meeting; one to one, small group or focus group/round table);* - *the stakeholders involved (and how you contacted participants and why these stakeholders are relevant) and if belonging to VCSC*	
Interest collected	*Please indicate whether stakeholders involved are interested*	
	In sending participant to the HEA training	*Yes/not*
	In hosting trained HEA for the action stage	*Yes/not*
	In contacting vulnerable consumers	*Yes/not*
	Other	*Describe*
Qualification schema		

Main conclusions (according to the qualification schema' structure)	***Role***	*Please, report and describe the main evidences collected on the "Role" dimension with reference to the profiles identifies in the NQF and / or other projects*
	Activities	*Please, report the main evidences collected on the "Activities" dimension*
	Competences	*Please, report the main evidences collected on the "Competences" dimension*
	Training	
Other (eventual)	*Actions/adjustment/proposals/recommendations suggested to be undertaken*	
Annexes (eventual)	*If any, please include a copy of customised materials you prepared and used.*	

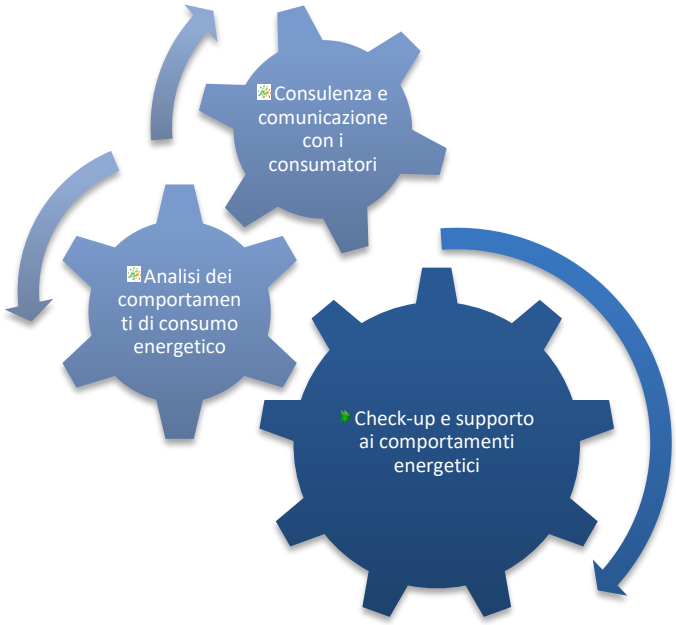
Annex 2 – Lo schema di qualifica del Tutor per l'Energia Domestica - TED (IT)

1. Il profilo del tutor per l'energia domestica

1.1 Un primo identikit

Il progetto ASSIST propone lo sviluppo e la valorizzazione di una figura professionale innovativa, il **consulente o tutor per l'energia domestica** (TED; corrispettivo del profilo Europeo dell'HEA - *Home Energy Advisor*) che svolge la sua attività professionale in **istituzioni** e/o in organizzazioni afferenti al settore **energetico** (inclusi gli attori del mercato energetico privato) o **sociale** (servizio sociale e terzo settore). Un primo identikit del consulente per l'energia domestica è stato tracciato nella proposta progettuale così da rappresentare un punto di partenza per la definizione del profilo professionale e del relativo percorso formativo e, al tempo stesso, una guida comune per le attività di ricerca e contestualizzazione realizzate dai partner per ciascun livello nazionale. Tale identikit identifica quale caratteristica centrale di tale profilo il contatto diretto e il supporto per il miglioramento dell'efficienza energetica rivolto ai consumatori vulnerabili. Il TED, infatti, fornisce informazioni, supporto e consigli a tali consumatori in modo semplice e comprensibile così da migliorare i loro comportamenti di consumo energetico e così da facilitarli nell'accesso agli incentivi e alle altre misure finanziarie di supporto. Le attività del TED possono infatti essere ricondotte a tre principali ambiti:

- Analisi dei comportamenti di consumo energetico;
- Check-up e supporto ai comportamenti energetici;
- Consulenza e comunicazione con i consumatori.



L'identificazione di questi primi "cluster di macro-attività" ha guidato la definizione del profilo, sia a livello europeo sia per ciascun contesto nazionale. A partire da questi elementi centrali comuni, il ruolo e le attività del TED si differenziano fortemente nei vari contesti professionali e lavorativi nei quali può essere inserito. Successivamente, le attività - e le sotto-attività - identificate all'interno dei tre principali cluster sono state, quindi, correlate a specifici fabbisogni di conoscenze, abilità e competenze.

1.2 Il profilo professionale del TED

Lo schema di qualifica del TED riportato in questo documento fa riferimento al profilo comune europeo dell'HEA, costruito a partire dall'integrazione organica delle evidenze (su contesti lavorativi, attività, e competenze) raccolte nei contesti nazionali dei paesi partner di ASSIST, sulla base di un'ampia ricerca sul campo, oltre che desk. Il profilo europeo dell'HEA è stato poi adattato e personalizzato dai partner in base ai loro contesti nazionali, in modo integrato alla definizione delle strategie formative, di rete e di azione da attuare negli specifici contesti nazionali.

Lo schema di qualifica proposto descrive la figura del TED in termini di

- PROFILO, ovvero:
  - ruoli e contesti lavorativi;
  - attività e sotto-attività;
  - conoscenze, abilità e competenze.
- PROGRAMMA FORMATIVO: I moduli e i risultati di apprendimento (*learning outcomes*) definiti coerentemente ai fabbisogni di conoscenze, abilità e competenze richiesti dai sistemi di attività caratterizzanti i diversi contesti lavorativi del TED.

1.2.1 Occupazioni e contesti lavorativi dell'HEA

Lo schema di qualifica del TED ne descrive anzitutto l'"**occupazione**", come definite nell'ambito del quadro di riferimento europeo ESCO, ovvero: *"un'occupazione è un raggruppamento di lavori che comportano attività simili e che richiedono un set similare di competenze*". In tal senso, l'"occupazione" non deve essere confusa con "lavoro" o con "qualifica lavorativa"; se, infatti, il concetto di "lavoro" rimanda a una sola persona e a un contesto di lavoro specifici, il concetto di "occupazione" raggruppa lavori, anche diversi e di diverse persone, in funzione di caratteristiche comuni.

Utilizzando tale approccio è possibile descrivere il ruolo del TED in termini di impatto generato dall'occupazione e/o di contributo fornito dalla stessa al raggiungimento di determinati obiettivi, singolarmente o insieme ad altre "occupazioni". Le attività di ricerca hanno confermato come l'introduzione del TED possa contribuire positivamente ad affrontare la povertà energetica e le principali barriere del mercato dell'energia affrontate dai consumatori vulnerabili. Ciò è considerato ancora più vero dagli attori coinvolti se si considera il ruolo del TED in termini di facilitazione e/o mediazione di comportamenti efficaci di consumo energetico, facilitando anche il superamento delle rilevanti barriere esistenti legate alla mancanza di fiducia e agli approcci culturali diffusi su questi temi. Questi punti sono emersi con pesi diversi tra i paesi partner coerentemente con l'approccio e la "maturità" rispetto ai temi della povertà energetica.

Tali considerazioni sono state ulteriormente confermate dall'analisi di numerosi progetti sperimentali similari, nazionali e europei. Tale analisi ha infatti confermato la rilevanza del ruolo di facilitazione e/o mediazione svolto da tali profili, per lo più esercitato all'interno di team di lavoro multi-professionali. Non rimandando, peraltro, a un profilo professionale "univoco" non trova una diretta integrazione all'interno dei quadri di qualifiche nazionali. In tutti i paesi ASSIST non esistono, infatti, profili professionale simili al TED all'interno dei repertori nazionali e/o regionali, fatta eccezione del Belgio (nel quadro delle qualifiche delle Fiandre) e del Regno Unito (dove esistono diversi profili simili, definiti anche in termini di livelli EQF e contesti lavorativi di riferimento).

In sintesi, l'analisi e "costruzione" dell'occupazione (alla "ESCO") fa emergere come il ruolo del TED:

- vada espresso in termini di "occupazione" e non di profilo o qualifica professionale/lavorativa;
- non sia rappresentano da un profilo professionale "autonomo" ma svolga, invece, un ruolo di supporto e integrativo all'interno di diversi contesti lavorativi;
- possa essere esercitato anche da profili e ruoli esistenti (quali ad esempio, l'operatore sociale, l'operatore di contact center così come il condomino stesso).

L'HEA può, quindi, agire "occupazioni" potenziali diverse – e integrative – in **contesti lavorativi** differenziali. Tre sono i principali contesti identificati dal progetto (e confermati dagli attori coinvolti):

1. **SISTEMA SETTORIALE,** con particolare riferimento alle aziende energetiche e/o di "servizi energetici", utilities, aziende di produzione/distribuzione di prodotti della "smart home", aziende di consulenza settoriali, autorità o enti di rappresentanza, etc. Il segmento "aziende" rileva sia rispetto al miglioramento dei servizi ai consumatori sia nella prospettiva della responsabilità sociale di impresa. I contesti lavorativi di maggior rilievo emersi rispetto al "settore energia" sono: i contact centres; le agenzie energetiche; le aziende per la smart home; i professionisti (ingegneri/altri professioni tecniche legate all'energia).
2. **SISTEMA SOCIALE,** rispetto a contesti e organizzazioni molto differenziati chef anno riferimento all'articolazione del servizio sociale, al "sistema" delle associazioni consumatori, organizzazioni del terzo settore (incluse le organizzazioni caritatevoli quali Croce Rossa, Caritas, etc.) e il social housing. I principali contesti di azione del TED nell'ambito del Sistema sociale sono stati indicati nei: servizi sociali, associazioni consumatori, organizzazioni del terzo settore e social housing (nei quali il TED agisce come pari tra pari);
3. **SISTEMA ISTITUZIONALE** con riferimento ai servizi sociali locali presso gli enti locali/Comuni, ai servizi sanitari, all'educazione ambientale, all'autorità energetica e alle

"agenzie" istituzionali. Due i principali contesti "istituzionali" dell'HEA emersi come più rilevanti: articolazioni comunali (sociali, degli uffici tecnici, etc) e contact center istituzionali.

Elementi comuni a tutte le occupazioni e i contesti lavorativi dell'HEA sono:

- la **difficoltà** legate al coinvolgimento **del target dei consumatori vulnerabili**. Se nei contesti d'azione del "sistema sociale" è più facile "raggiungerli" è più difficile sviluppare abilità tecniche adeguate per informarli e supportarli pienamente (ciò a sua volta rende la dimensione peer to peer molto impegnativa). Gli altri due contesti lavorativi evidenziano dimensioni contrapposte. Il contesto dell'housing sociale può rappresentare un potenziale equilibrio tra le due dimensioni di difficoltà;
- la necessità di mantenere una netta **distinzione tra risparmio energetico ed efficienza energetica**. L'"occupazione" del TED è, infatti, riferibile al alla sensibilizzazione, al trasferimento di informazioni e capacità, alla responsabilizzazione ed empowerment dei consumatori vulnerabili rispetto a compartimenti di risparmio energetico. Il support all'efficienza energetica, invece, richiede competenze tecniche: più complesse; riferibili ad altri (esistenti) consulenti in materia di energia; azioni più "profonde", costose e complesse sull'intero edificio.

Queste considerazioni possono essere lette anche in termini di conferma del potenziale di occupazione del TED all'interno di team multi-professionali e, parimenti, di considerare contesti lavorativi "allargati" del TED, all'interno dei quali lo stesso collabora e/o supporta altri professionisti/figure (dall'amministratore di condominio all'operatore di contact center).

1.2.2 Attività e competenze dell'HEA

Come anticipato, le principali attività HEA sono state clusterizzate in tre aree principali:

- Analisi dei comportamenti di consumo energetico;
- Check-up e supporto ai comportamenti energetici;
- Consulenza e comunicazione con i consumatori.

Le tre aree di attività sono state confermate in tutte le ricerche nazionali (con riferimento alle attività sia desk sia sul campo) che hanno anche consentito l'articolazione di dettaglio delle sotto-attività e l'identificazione dei relativi fabbisogni di conoscenze, abilità e competenze. Una panoramica completa di tutte le evidenze raccolte in termini di attività (e sotto-attività) e di conoscenze, abilità e competenze per ciascuna delle tre principali aree di intervento del TED è riportata nella tabella seguente.

Attività		Conoscenze, abilità e competenze
Analisi dei comportamenti di consumo	Identifica le vulnerabilità e i suoi principali driver/ dimensioni Personalizzare le informazioni rispetto ai target Raccogliere informazioni (questionari, interviste, osservazioni, revisione dati, ...)	Conoscenze tecniche sul settore con particolare riferimento a: ▸ sistema e mercato energetico ▸ sistema retail ▸ energia domestica ▸ bollette energetiche e strutture tariffarie ▸ servizi disponibili sul mercato

	Identificare i punti di consumo di energia in un'unità domestica / famiglia Analizzare la casa e gli elettrodomestici Raccogliere i contratti di fornitura e interpreta i costi energetici Analizzare la storia dei consumi e gli interventi di manutenzione ordinaria / straordinaria Analizzare le abitudini e I bisogni speciali (ad es. Biotecnologie)	▶ soluzioni, costi e finanziamenti per le energie rinnovabili (elementi di base) Conoscenze tecniche sul sistema sociale con riferimento a: ▶ struttura e servizi del sistema sociale ▶ dimensioni e caratteristiche della vulnerabilità ▶ povertà energetica (cause/effetti e politiche/azioni) ▶ Capacità di analizzare il contesto in cui operare ▶ Capacità di osservare, misurare, analizzare e sintetizzare ▶ Capacità di adattarsi alle situazioni ▶ Capacità e competenze comunicative e relazionali
Check-up e supporto ai comportamenti energetici	Misurare il consumo energetico e l'efficienza energetica di una casa/unità familiare Identificare efficienza e appropriatezza dell'uso dei sistemi Realizzare un "check-up energetico semplificato" Fornire contatti e risorse Implementare pacchetti/strumenti di risparmio energetico per monitorare/ottimizzare il consumo energetico Analizzare bollette energetiche e opzioni di pagamento Supportare il risparmio energetico, anche in termini di "consigli comportamentali" per ridurre consumo di energia Confrontare e supportare l'analisi di tariffe/contratti e/o dare consigli sui contratti energetici Identificare incentivi economici e procedure di richiesta	▶ Capacità di classificare ed evidenziare gli usi rilevanti dell'energia ▶ Capacità di analisi del consumo energetico ▶ Capacità di portare avanti il check-up energetico semplificato ▶ Capacità di calcolare risparmi energetici e miglioramenti di efficienza ▶ Capacità di "analisi funzionale" per tipologie di consumatori ▶ Competenze legate alla formulazione di opportunità per migliorare l'efficienza energetica ▶ Conoscenze e abilità relative all'identificazione e all'accesso alle opportunità di finanziamento (incentivi, bonus, ...).
Consulenza e comunicazione con i consumatori	Fornire supporto rispetto a questioni energetiche generiche e/o specifiche Informare sull'uso appropriato dei sistemi Informare sui modi di pagare per gas e elettricità Comunicare consigli e suggerimenti per il risparmio energetico Preparare rapporti personalizzati e/o "Linee guida per l'energia familiare" Promuovere l'interazione peer-to-peer Supportare la creazione di gruppi di acquisto Organizzare riunioni / workshop Realizzare guide e opuscoli, materiali informativi, presentazioni o altri strumenti di comunicazione Valorizzare l'interazione efficace tra le parti interessate	▶ Capacità e competenze comunicative (orale, scritta, …) ▶ Abilità comunicative con personale tecnico e non tecnico ▶ Pianificazione e organizzazione degli eventi ▶ Conoscenza dei gruppi di acquisto ▶ Intelligenza sociale ▶ Capacità di realizzazione di materiali di comunicazione ▶ Abilità relazionali (empatia, comunicazione efficace, ...) ▶ Competenze legate alla proposta di opportunità per migliorare l'efficienza energetica

L'individuazione del sistema di competenze del TED è stata realizzata, coerentemente alle indicazioni e agli approcci metodologici comuni europei, in termini di sistema modulare correlato all'articolazione delle attività così da valorizzare contemporaneamente la dimensione di schema comune unitario e quella di contestualizzazione e personalizzazione dello stesso schema. L'articolazione e la "pesatura" interna di attività e sotto-attività varia infatti nei diversi Paesi e in ragione dei diversi contesti lavorativi all'interno del sistema istituzionale, sociale o settoriale del TED. L'approccio modulare utilizzato per identificare e descrivere le attività e le sotto-attività del TED - e le relative competenze - richieste rappresenta il quadro concettuale e operativo per la definizione dei processi di formazione, networking e azione sul campo dei TED in ciascun livello nazionale.

2. La formazione per il TED

Tutti i contesti lavorativi e ruoli del TED richiamano la necessità di definire ed erogare - ed aggiornare costantemente - programmi di formazione efficaci. A partire dai fabbisogni di competenze rilevati dal sistema di attività, è stato sviluppato un programma formativo ASSIST, modulare che consente di garantire contemporaneamente:

- un sistema formativo comune europeo (anche riferimento alla possibilità di riconoscimento delle competenze, all'applicazione del sistema ecvets, al supporto alla mobilità professionale e così via);
- un sistema formativo personalizzazione, a livello nazionale, rispetto: al background ed all'entry-level del partecipante (disoccupato, consumatore vulnerabile, operatore sociale, operatore help desk e così via); ai contesti lavorativi di riferimento (servizi sociali, help desk, housing sociale e così via).

In Italia saranno formati 75 TED; i partecipanti - i futuri TED – rappresenteranno tipologie di target diversi, rispetto sia ai profili in entrata sia ai potenziali contesti lavorativi. In ogni paese anche i consumatori vulnerabili intraprenderanno la formazione ASSIST per i TED al fine di attivare metodologie di azione di sostegno "peer to peer". I consumatori vulnerabili che intraprenderanno la formazione HEA possono essere professionisti disoccupati, proprietari di case popolari, volontari e così via, il loro livello di ingresso e le esigenze di formazione differiscono ampiamente. Pertanto, considerando le diverse "tipologie" di consumatori vulnerabili coinvolti nei diversi paesi (e all'interno dello stesso paese) così come, più in generale, l'ampia differenziazione dei profili in entrata, il piano formativo, grazie alla sua struttura modulare e ai meccanismi di valutazione impiegati, consentirà percorsi di fruizione personalizzati. Nell'ambito delle linee guida nazionali sulla formazione verrà descritto il mix di target coinvolti così come l'articolazione specifica del piano formativo di formazione, comprensiva di con tenuti, durare e scelte metodologiche di moduli e unità didattiche cosi come delle decisioni operative relative alle azioni di promozione e coinvolgimento. A partire

dall'analisi di ruoli, attività e competenze del TED per ciascuna delle tre macro-aree individuate (analisi, check-up, comunicazione), è stato definito un sistema modulare di *learning outcome* organizzati in moduli e unità didattiche auto-consistenti.

I fabbisogni di conoscenze, abilità e competenze dell'HEA rispetto ai quali si articola il piano formativo può essere riferito a tre macro-aree: **tecnica, sociale e relazione**. Conoscenze e competenze sono richieste rispetto ad aspetti "tecnici" del sistema energia e del sistema sociale. Per tutte le attività si rendono necessarie azioni formative efficaci per lo sviluppo delle competenze adeguate a guidare e supportare comportamenti efficaci di consumo di energia. Per tutti i contesti lavorativi è stata fortemente evidenziata la necessità di enfatizzare la dimensione relazionale. L'esigenza di assumere un focus specifico di articolazione e bilanciamento delle aree di competenze tecniche, sociali e relazionali è emerso rispetto all'azione del TED nell'ambito dei contact center (istituzionali, di agenzie energetiche, di associazione di consumatori, etc) in ragione delle modalità specifiche -anche scritte e/o mediate dalle tecnologie – di comunicazione, contatto e supporto dei target. A corollario di queste tre aree è emersa, infine, l'esigenza di sviluppare azioni formative specifiche su **sicurezza e privacy** (le scelte specifiche su se e come integrare questi argomenti saranno dettagliate nell'ambito delle linee guida di formazione nazionali. Il piano formativo complessivo e generale per il TED prevede, infine, la realizzazione di un **modulo introduttivo** comune, da erogare a tutti i partecipanti (indipendentemente dal loro background, conoscenze e competenze) attinente: la figura del TED; il programma di formazione e la piattaforma di supporto; le risorse di approfondimento; la presentazione dell'azione e del network ASSIST.

Come anticipato, è stato definito un sistema modulare di moduli di formazione; la seguente tabella rappresenta la struttura generale del corso di formazione ASSIST TED che sarà adattata a ciascun contesto nazionale e dettagliato nelle linee guida della strategia di formazione nazionale in base a: contesti operativi (servizi sociali vs help desk vs social housing e così via); profilo di ingresso (disoccupato, consumatore vulnerabile, operatore sociale, help desk e così via). Coerentemente alla sua struttura modulare, la tabella riporta:

- i ***learning outcomes***, espressi in termini di moduli correlati a conoscenze, abilità e requisiti delle competenze e al sistema di attività per ciascuna delle tre macro-aree;
- un range temporale. La **durata** di moduli e unità verrà definita, per ciascun paese, in base a : obiettivo, livello di ingresso, contesti (settoriali/occupazionali), insieme alle scelte metodologiche e di articolazione di contenuti e risorse di apprendimento.

2.1.1 Il piano formativo generale

	Attività	Conoscenze, Abilità, Competenze	Learning outcome/Contenuti	Ore
	Modulo Introduttivo su ASSIST e TED	Presentazione del modello ASSIST basato sulla figura del TED; Presentazione del programma formativo ASSIST e della piattaforma di eLearning Presentazione delle risorse di supporto ASSIST		**4 (2-4)**
Analisi dei comportamenti di consumo energetico	Identifica le vulnerabilità e i suoi principali driver/ dimensioni Personalizzare le informazioni rispetto ai target Raccogliere informazioni (questionari, interviste, osservazioni, revisione dati, ...) Identificare i punti di consumo di energia in un'unità domestica / famiglia Analizzare la casa e gli elettrodomestici Raccogliere i contratti di fornitura e interpreta i costi energetici Analizzare la storia dei consumi e gli interventi di manutenzione ordinaria / straordinaria Analizzare le abitudini e I bisogni speciali (ad es. Biotecnologie)	Conoscenze tecniche sul settore con particolare riferimento a: ▪ sistema e mercato energetico ▪ sistema *retail* ▪ energia domestica ▪ bollette energetiche e strutture tariffarie ▪ servizi disponibili sul mercato ▪ soluzioni, costi e finanziamenti per le energie rinnovabili (elementi di base)	**Conoscenze tecniche di base sul settore** Il <u>settore energia</u>. Conoscenze di base sulla struttura settoriale, con un focus specifico su: il sistema retail; gli attori coinvolti; le autorità esistenti; gli sportelli per i consumatori; i servizi disponibili sul mercato <u>Quadro normativo e regolamentare</u>. Conoscenze di base su: legislazione relativa all'offerta di energia; regolamentazione del sistema di distribuzione di energia, ivi incluse le politiche europee e nazionali; le strutture tariffarie). <u>Consumo e risparmio energetico</u>. Conoscenze di base su: statistiche su consumo e propensioni di consumo; indicatori energetici e di efficienza energetica; consumi energetici domestici (luce, gas, …; apparecchiature e elettrodomestici.	**6-12**
		Conoscenze tecniche sul sistema sociale con riferimento a: ▪ struttura e servizi del sistema sociale ▪ dimensioni e caratteristiche della vulnerabilità ▪ povertà energetica (cause/effetti e politiche/azioni)	**Conoscenze tecniche di base sul sistema sociale e sulla vulnerabilità** Il <u>sistema sociale.</u> Conoscenze di base su: la struttura e gli attori del sistema sociale; il Terzo settore e I servizi sociali; il quadro normativo e regolamentare. Il <u>sistema "consumatori"</u> (associazionismo, servizi, regolamentazione). <u>Programmi, politiche e interventi in ambito sociale</u>. Conoscenze di base su: programmi, politiche e interventi esistenti; principali attori; procedure di accesso ai servizi; prima panoramica su fondi, incentivi e servizi di supporto per i target del sistema sociale.	**6-12**

			Vulnerabilità e povertà energetica. Conoscenze di base sulla vulnerabilità e sulle sue caratteristiche, sia a livello europeo sia nazionale, con un focus sulla povertà energetica (statistiche, target, dimensioni rilevanti, impatti sociali e sulla salute della vulnerabilità). Misure e regolamentazioni specifiche, locali e nazionali, a protezione dei consumatori vulnerabili.	
Check-up e supporto ai comportamenti energetici		Capacità di analizzare il contesto in cui operare Capacità di osservare, misurare, analizzare e sintetizzare Capacità di adattarsi alle situazioni Capacità e competenze comunicative e relazionali	**Trasversali** (cognitive e comportamentale) Si rimanda alla descrizione di competenze e *learning outcome* dell'area "**Comunicazione e support ai consumatori"**	
	Misurare il consumo energetico e l'efficienza energetica di una casa/unità familiare Identificare efficienza e appropriatezza dell'uso dei sistemi Realizzare un "check-up energetico semplificato" Fornire contatti e risorse Implementare pacchetti/strumenti di risparmio energetico per monitorare/ottimizzare il consumo energetico Analizzare bollette energetiche e opzioni di pagamento Supportare il risparmio energetico, anche in termini di "consigli comportamentali" per ridurre consumo di energia Confrontare e supportare l'analisi di tariffe/contratti e/o dare consigli sui contratti energetici	Capacità di classificare ed evidenziare gli usi rilevanti dell'energia Capacità di analisi del consumo energetico Capacità di portare avanti il check-up energetico semplificato Capacità di calcolare risparmi energetici e miglioramenti di efficienza Capacità di "analisi funzionale" per tipologie di consumatori Competenze legate alla formulazione di opportunità per migliorare l'efficienza energetica Conoscenze e abilità relative all'identificazione e all'accesso alle opportunità di finanziamento (incentivi, bonus, ...). Conoscenze, abilità e competenze specifiche relative alle "Azioni ASSIST"	**Check-up dei comportamenti energetici** Abitudini di consumo energetico Consumo energetico domestico Introduzione al check-up energetico domestico Come realizzare un check-up energetico domestico Attività e strumenti di monitoraggio di I livello **Supporto ai comportamenti energetici** Comportamenti di consumo energetico – consigli Analisi dei contratti e delle bollette Supporto agli incentivi per l'energia Procedure di accesso a incentivi e bonus Il database delle buone pratiche e di incentivi **Contenuti specialistici addizionali** Interventi a costo zero Gruppi di acquisto Energie rinnovabili per I consumatori vulnerabili Contenuti addizionali relativi alle specifiche **"AZIONI ASSIST"** previste	**14-30**
		Capacità relazionali e competenze empatiche	**Trasversali** (cognitive e comportamentale)	

	Identificare incentivi economici e procedure di richiesta		Si rimanda alla descrizione di competenze e *learning outcome* dell'area "**Comunicazione e support ai consumatori"**	
Consulenza e comunicazione con i consumatori	Fornire supporto rispetto a questioni energetiche generiche e/o specifiche Informare e consigliare sull'uso appropriato dei sistemi Informare sui modi di pagare per gas e elettricità Comunicare consigli e suggerimenti per il risparmio energetico Preparare rapporti personalizzati e/o "Linee guida per l'energia familiare" Promuovere l'interazione peer-to-peer Supportare la creazione di gruppi di acquisto Organizzare riunioni / workshop Realizzare guide e opuscoli, materiali informativi, presentazioni o altri strumenti di comunicazione Valorizzare l'interazione efficace tra le parti interessate	Capacità e competenze comunicative (orale, scritta, …) Abilità comunicative con personale tecnico e non tecnico Pianificazione e organizzazione degli eventi Conoscenza dei gruppi di acquisto Intelligenza sociale Capacità di realizzazione di materiali di comunicazione Abilità relazionali (empatia, comunicazione efficace, ...) Competenze legate alla proposta di opportunità per migliorare l'efficienza energetica Esigenze di conoscenze, abilità e competenze legate alle precedenti due aree di attività, ovvero: Capacità di analizzare il contesto in cui operare Capacità di osservare, misurare, analizzare e sintetizzare Capacità di adattarsi alle situazioni Capacità e competenze comunicative (orale, scritta, telefonica e mediata dalle tecnologie) Capacità e competenze comunicative, relazionali ed empatiche	Capacità e competenze relazionali, intelligenza sociale e empatia Capacità e competenze di comunicazione "verbale" (scritta, orale, telefonica, mediata dalle tecnologie) e non verbale Capacità di pianificazione, promozione e organizzazione di incontri ed eventi	**10-20**

Annex 3 – Esquema de Cualificación del Agente Energético Doméstico (ES)

1. Perfil del agente energético doméstico

1.1 Retrato del perfil

Se presenta aquí un retrato inicial del Agente Energético Doméstico, en adelante AED como punto de partida tanto para la definición del perfil profesional como para el diseño y conceptualización del curso de formación.

El proyecto ASSIST propone el desarrollo y armonización de un perfil profesional innovador, el agente energético doméstico (AED), que puede trabajar tanto en organizaciones energéticas, sociales e institucionales, como en empresas privadas del mercado energético, como por ejemplo las compañías energéticas.

Este retrato inicial define el AED como un asesor en contacto directo con los consumidores en situación de vulnerabilidad para proporcionar apoyo en materia de eficiencia energética a los consumidores vulnerables y más específicamente a las personas en situación de pobreza energética. El objetivo del AED es el de darles información, apoyo y asesoramiento de una manera fácil, comprensiva y practica para mejorar sus hábitos en el uso de energía y facilitarles el acceso a medidas financieras de apoyo.

Aunque puede variar en cada ámbito, se identifican tres actividades principales que pueden desarrollar estos profesionales:

- análisis de los hábitos en el uso de la energía;
- diagnósticos energéticos en los hogares y optimización tarifaria;
- comunicación y asesoramiento a los consumidores.

1.2 Perfil profesional del AED

El trabajo hecho en el marco del proyecto ASSIST ha permitido profundizar un poco más sobre el perfil de AED e identificar roles específicos, actividades y competencias relacionadas con los distintos contextos de trabajo. El siguiente esquema describe el trabajo del AED y sus características:

- Perfil en términos de:
  - Roles del AED y ámbitos de trabajo;
  - Actividades del AED;
  - Conocimientos, habilidades y competencias del AED;
- Programa de formación: los resultados del aprendizaje y los módulos de estudio se han definido de acuerdo con las competencias requeridas para las actividades que se llevaran a cabo en los diversos roles y contextos de trabajo del AED.

Es importante subrayar que este esquema de cualificación representa el marco común que luego será adaptado y personalizado por los socios del proyecto de acuerdo con sus contextos nacionales, así como la estrategia del proyecto ASSIST que se implementará en el país para la formación, red de trabajo y acción del AED.

1.2.1 AED como ocupación

Este esquema de cualificación describe la ocupación del AED, tal como se define dentro del marco europeo de ESCO, la Clasificación europea de capacidades/competencias, cualificaciones y ocupaciones: “una ocupación es una agrupación de trabajos que implican tareas similares y que requieren unas capacidades y competencias similar. Las profesiones no deben confundirse con trabajos o títulos de trabajo. Mientras que un trabajo está ligado a un contexto específico y ejecutado por una persona, las ocupaciones agrupan trabajos por características comunes”.

Como ya se ha anticipado, el AED puede desempeñar **diferentes ocupaciones dentro de distintos ámbitos como por ejemplo:**

- **Sector energético,** en referencia a las organizaciones, autoridades, agencias de energía, empresas de servicios energéticos, empresas suministradoras, consultorías de energía y servicios de energía representativos. Este ámbito podría estar interesado por ejemplo en la "Responsabilidad Social Corporativa" y/o mejorar sus servicios de atención al cliente mediante un AED y/o formar a sus empleados dedicados a la atención al cliente.
- **Sector social** incluyendo organizaciones del tercer sector, asociaciones de consumidores, organizaciones sociales y organizaciones benéficas, asociaciones de vecinos, etc.
- **Instituciones** relacionadas con los servicios sociales locales/regionales, los servicios de salud, educación ambiental, así como las autoridades energéticas y agencias institucionales de energía

Para todas las ocupaciones y ámbitos de trabajo se han identificado:

- complejidad para llegar a los consumidores vulnerables. Para los ámbitos de trabajo "relacionados con el sector social" es más sencillo llegar a ellos pero es más difícil desarrollar las habilidades técnicas adecuadas para informarlos y apoyarlos. Eso, a su vez, hace que la comunicación de igual a igual sea muy difícil de alcanzar. El contexto de la vivienda social es el potencialmente más adecuado;
- necesidad de mantener una diferenciación directa entre asesorar en el ahorro de energía y en eficiencia energética. El AED puede apoyar en el conocimiento, el desarrollo de competencias y el empoderamiento de los usuarios en referencia a las conductas de ahorro de energía, mientras que para asesorar en eficiencia energética se necesitan habilidades técnicas más complejas y acciones más "profundas" (y más costosas y complejas) en el edificio en general, pertenecientes a otros profesionales energéticos (ya existentes).

Estas últimas consideraciones confirman la oportunidad de enmarcar el AED como trabajador dentro de equipos profesionales más amplios.

1.2.2 Actividades y competencias del AED

Las principales actividades del AED se han agrupado en tres áreas principales:

- análisis de los hábitos en el uso de la energía;
- diagnóstico energético en el hogar;
- comunicación y asesoramiento a los consumidores.

Las competencias del AED se han articulado con un sistema modular correlacionado con las actividades a desarrollar para valorar tanto un esquema común y como la diversidad nacional. La **articulación y el peso de las subactividades** varían según los diversos **ámbitos** de actuación (energía vs. social vs. institucional) y entre los **países socios**. El

enfoque modular empleado para identificar y describir las actividades y subactividades del AED, así como las competencias requeridas, representan el marco conceptual y operativo para la definición de la formación, la creación de las redes de trabajo y los procesos de acción en el terreno del AED.

	Actividades	Conocimientos, habilidades y competencias
Análisis del comportamiento energético	• Identificar la posible vulnerabilidad y sus principales conductas y dimensiones • Adaptar la información a la tipología del servicio • Recopilar información (cuestionarios, entrevistas, observaciones, revisión de datos…) • Identificar los puntos de consumo energético en una vivienda o unidad familiar • Analizar la vivienda y sus aparatos eléctricos • Recopilar los contratos de suministros – Interpretar el coste de la energía • Analizar el historial de consumo y las intervenciones de mantenimiento ordinarias/extraordinarias • Analizar hábitos y necesidades especiales	Conocimientos técnicos del sector con especial referencia a: • mercado energético y tipos de energía • mercado minorista • usos energéticos en la vivienda • facturas de energía y estructuras tarifarias • servicios disponibles en el mercado • soluciones de energías renovables, costos y financiamiento (conceptos básicos) Conocimientos técnicos del sistema social con referencia especial a: • estructura y servicios del sistema social • dimensiones y características de la vulnerabilidad • pobreza energética (causas/efectos y políticas/acciones) • Capacidad de analizar el contexto en el que opera • Capacidad de observación, medición, análisis y síntesis • Capacidad de adaptarse a las situaciones • Habilidades y competencias de comunicación y relacionales
Diagnóstico energético en el hogar	• Medir el uso de la energía y la eficiencia energética en un hogar • Identificar usos eficientes/óptimos • Realizar un chequeo de la energía de forma simplificada • Facilitar una lista de recursos y contactos interesantes • Implementar paquetes/herramientas de ahorro energético para monitorizar/optimizar la energía • Analizar las facturas de energía y las opciones de pago • Apoyar en hábitos de ahorro energético como: “consejos de uso” para reducir el consumo energético” • Comparar y cambiar tarifas y/o asesorar sobre los contratos de energía • Identificar mecanismos de incentivos económicos + solicitudes de envío	• Capacidad de clasificar y resaltar los principales usos energéticos • Habilidades para el análisis del consumo energético • Habilidades para llevar a cabo el control de la energía de una forma simplificada • Capacidad de calcular ahorros energéticos y mejoras en la eficiencia • Competencias relacionadas con un “análisis funcional” según la tipología de consumidor • Competencias relacionadas con la formulación de oportunidades para mejorar la eficiencia energética • Conocimientos y habilidades para la identificación y el acceso a mejores oportunidades de financiación (incentivos, bonificaciones…)

Comunicación y asesoramiento a los consumidores	Asesorar sobre energía en general y sobre cuestiones específicas Aconsejar sobre el uso apropiado de los sistemas energéticos Informar sobre las formas de pago de gas y electricidad Comunicar consejos sobre hábitos para el ahorro energético Preparar informes personalizados y/o "Guías de la energía en el hogar" Promover la interacción de igual a igual Apoyar la creación de grupos de compras Organizar reuniones/talleres Realizar guías/folletos Preparar materiales informativos, presentaciones u otras herramientas de comunicación Promover la interacción efectiva entre las partes interesadas	Competencias y habilidades comunicativas (oral, auditiva y escrita) Comunicación con el personal técnico y no técnico Organización y planificación de eventos Conocimientos sobre grupos de compras Empatía Personalidad fácilmente accesible Inteligencia social Competencias y habilidades comunicativas (también escritas, por teléfono, mediar con las TIC) Habilidades de escritura (presentaciones…) Habilidades relacionales (empatía, buena comunicación…) Competencias relacionadas con las propuestas de oportunidades para la mejora de la eficiencia energética

2. Formación del agente energético doméstico

Todos los ámbitos de trabajo y roles relevantes del AED requieren de la definición, implementación y actualización de programas de formación efectivos. A partir de los requerimientos del AED, se ha creado un programa ASSIST modular que permite garantizar:

- Un marco común de formación profesional en la UE
- Una adaptación nacional según las características del AED: antecedentes/nivel inicial (desempleados, consumidores vulnerables, trabajadores sociales, servicios de atención al cliente, etc.) y contextos de trabajo (servicios sociales, atención al consumidor, viviendas sociales, etc.)

Dentro de los programas nacionales de formación (D3.2) se describirá la combinación específica de los objetivos, abarcando la elección de los aspectos metodológicos (p.e. a distancia vs presencial por unidad/módulo) y operativos.

Aunque las diferencias del grupo objetivo entre los países están relacionadas con el AED, es importante destacar que en cada país también los consumidores vulnerables realizaran la formación ASSIST para activar metodologías de apoyo "entre iguales". Como los consumidores vulnerables que pueden llevar a cabo la formación del AED pueden ser personas desempleadas, residentes en viviendas sociales, voluntarios, etc. su nivel de ingresos y su necesidad de formación pueden diferir en gran medida. Por lo tanto, considerando las diferentes "tipologías" de consumidores vulnerables involucrados en los

distintos países (y dentro del mismo país), la formación ASSIST para estos se ha definido siguiendo las estrategias nacionales. A partir del análisis de los roles, actividades y competencias del AED, agrupados en las tres áreas principales, se ha definido un sistema modular de aprendizaje y dichos módulos de la formación.

Acorde con las tres actividades, se requieren tres áreas principales de competencias para el AED: **técnica, social y relacional**. Se requieren conocimientos técnicos energéticos (incluidas todas las competencias requeridas para el AED, desde la asesoría hasta la acción de campo) y sobre el sistema social (incluidas las cuestiones de vulnerabilidad). Definir el peso de las dimensiones técnicas, sociales y relacionales dentro del curso ha sido un reto debido a las diferentes perspectivas de los actores involucrados. Además, las necesidades de formación en aspectos de hábitos sobre el uso de la energía y las competencias relacionales son necesarias en todos los casos. En todos los contextos, se destaca como un punto crucial la necesidad de ofrecer una formación específica, con especial referencia al desarrollo de competencias “relacionales”, comunicativas y empáticas por el hecho de tratar con consumidores y consumidores vulnerables. Se ha resaltado la **necesidad de enfatizar la dimensión relacional**, sin dejar de lado la relevancia de las dimensiones técnicas (tanto en términos de rol de asesoría energética como de competencias técnicas requeridas).

Además, se debe prestar especial atención a la necesidad de equilibrar las tres dimensiones del AED (técnica-social-relacional) al analizar el papel del AED en los front office (de empresas o agencias energéticas; de asociaciones de consumidores, de instituciones públicas tales como las Agencias Nacionales de Energía). En estos casos, las habilidades técnicas y relacionales del AED deben estar muy desarrolladas para llevar a cabo comunicaciones telefónicas y escritas.

Por último, pero no menos importante, la **formación en las siguientes áreas** puede ser crucial, especialmente si el lugar de trabajo del AED se enmarca en sectores específicos: salud y seguridad; protección de datos, confidencialidad y sistemas de datos; políticas y procedimientos de la compañía.

La elección de incluir y de qué manera estos temas en el curso ASSIST para los AED se detallarán en las pautas nacionales de la formación (dentro del curso de formación ASSIST no se han asignado horas para estos temas). Por último, el programa de formación del AED prevé un módulo común “AED ASSIST – Módulo introductorio” para presentar a todos los alumnos (independientemente de sus antecedentes, conocimientos y habilidades):

- Modelo ASSIST basado en la figura del AED;
- Programa y plataforma de formación ASSIST;
- Recursos de soporte ASSIST como: Hoja informativa del proyecto, comunicación al consumidor (recursos informativos relacionados con la energía y dirigidos a los consumidores);
- Acciones ASSIST (recursos que se utilizarán para brindar asesoramiento a consumidores vulnerables) y redes de trabajo del AED (recursos sobre el funcionamiento de la red de trabajo y sus ventajas).

La estructura general del curso de formación se ha definido a partir de un sistema de aprendizaje basado en módulos de formación. Esta estructura será adaptada a cada contexto nacional y se detallará en las directrices de la estrategia nacional de formación (D3.2) de acuerdo con: contextos específicos de trabajo del AED (servicios sociales vs atención al cliente vs viviendas sociales, etc.) y el perfil inicial (desempleado, consumidor vulnerable, trabajador social, personal de atención al cliente, etc.) Como un marco general de la formación del AED, la siguiente tabla muestra:

- **Resultados del aprendizaje** relacionados con los requisitos de competencias, conocimientos y habilidades;
- **Módulos / contenidos** de cada resultado del aprendizaje y, para cada uno, un **rango de tiempo de duración**. Teniendo en cuenta el promedio de duración de cada módulo, el programa general de formación tendrá una duración de 36 horas (más 4 horas del módulo introductorio). En cada país, de acuerdo con las características específicas del alumno (nivel inicial de competencias) y los contextos (sectoriales y ocupacionales) se definirá la longitud del módulo.

Actividades	Conocimientos, habilidades y competencias	Resultados del aprendizaje/ Módulos/ Contenidos	Horas
Módulo introductorio ASSIST AED	Ilustrar el modelo ASSIST basado en la figura del AED; Presentar el programa de formación ASSIST y la plataforma de trabajo; Presentar los recursos de soporte de ASSIST.		**4** **(2-4)**
Análisis del comportamiento energético Identificar la vulnerabilidad eventual y sus principales directrices/dimensiones Personalizar la información al objetivo Recopilar información (cuestionarios, entrevistas, observaciones, revisión de datos…) Identificar los puntos de consumo de energía del hogar Analizar la vivienda y sus aparatos eléctricos Recopilar los contratos de suministro y estimar el coste de la energía Analizar el historial de consumo y las intervenciones mantenimiento ordinarias/extraordinarias Analizar los hábitos y las necesidades especiales	Conocimientos técnicos sobre el sector energético con especial referencia a: ▪ Sistema y mercado energético ▪ Mercado minorista ▪ Usos de la energía en el hogar ▪ Facturas energéticas y estructuras tarifarias ▪ Servicios disponibles en el mercado	**Conocimiento básico del sector energético** El sector energético (conocimiento básico sobre la estructura del sector, enfoque en el sistema minorista y en los principales actores involucrados, incluidas las autoridades y los departamentos de atención al cliente; servicios disponibles en el mercado) Legislación y reglamentos (marco general de referencia; legislación sobre el suministro de energía; regulación de la comercialización de la energía y políticas energéticas, incluidas las políticas nacionales y de la UE; facturas de energía y estructuras tarifarias) Consumo y ahorro energético (conocimientos básicos sobre las estadísticas de consumos energéticos; introducción a los indicadores energéticos y de eficiencia energética) Sistemas de uso de la energía en el hogar (iluminación, gas…), aparatos y dispositivos eléctricos	**6-12**
	Conocimientos técnicos sobre el sistema social con especial referencia a: ▪ Estructura y servicios del sistema social ▪ Dimensiones y características de la vulnerabilidad ▪ Regulación específica para la protección del consumidor vulnerable ▪ Pobreza energética (causas/efectos y políticas/acciones)	**Conocimiento básico sobre el sistema social y la vulnerabilidad** El sistema social (conocimiento básico sobre: estructura y actores del sistema social, tercer sector y servicios sociales, marco general de legislación y regulación relevante) Sistema de "consumidores" (asociaciones, servicios, regulaciones) Programas, políticas y acciones sociales (conocimiento básico sobre programas, políticas e	**6-12**

			intervenciones existentes, principales actores y procedimientos relacionados con el acceso a los servicios (incluida una primera visión general de incentivos, financiación y servicios de apoyo para los objetivos del sistema social) <u>Vulnerabilidad y pobreza energética</u> (marco principal sobre vulnerabilidad y sus características tanto a nivel de la UE como nacional, enfocado en la pobreza energética, incluidas las principales estadísticas del fenómeno, los objetivos, las dimensiones de la vulnerabilidad, los resultados sanitarios y sociales de la vulnerabilidad) Medidas, protocolos nacionales/locales existentes… para la protección del consumidor vulnerable (normas específicas)	
Control y apoyo en el uso de la energía		Capacidad de análisis del contexto en el que trabaja Capacidad de observación, medición, análisis y síntesis Capacidad de adaptación a las situaciones Competencias y habilidades comunicativas/relacionales	**Transversal** (cognitiva y de conducta) Consultar competencias de **"Comunicación y asesoramiento al consumidor"** y el área de resultados del aprendizaje	
	Medir el uso de la energía y la eficiencia energética en un hogar Identificar los sistemas eficientes/apropiados Realizar un chequeo de energía de forma simplificada Facilitar una lista de recursos y contactos interesantes Implementar paquetes/herramientas de ahorro energético para monitorizar/optimizar la energía Analizar las facturas de energía y las opciones de pago	Capacidad de clasificar y resaltar los principales usos de la energía Capacidad de llevar a cabo un control simplificado de la energía que, a su vez, requiere habilidades de análisis del consumo energético Capacidad de calcular ahorros energéticos y mejoras de eficiencia energética Competencias relacionadas con un "análisis funcional" según la tipología de consumidor	**Refrescar recursos de comunicación y acción** **Chequeo del comportamiento energético** Hábitos de consumo de energía Consumo de energía doméstica Introducción al control de la energía doméstica Cómo desarrollar un chequeo simplificado Actividades i herramientas de monitoreo (nivel inicial) **Apoyo en hábitos de uso de la energía** Consejos sobre hábitos energéticos Análisis de los contratos y las facturas energéticas Apoyo en la financiación de la energía	**14-30**

	Comparar y cambiar tarifas y/o asesorar sobre los contratos de energía Identificar mecanismos de incentivos económicos + solicitudes de envío	Competencias relacionadas con la propuesta de oportunidades para mejorar la eficiencia energética Conocimientos de compras colectivas Conocimientos y habilidades relacionadas con la identificación y el acceso a oportunidades de financiación (incentivos, bonificaciones, etc.) **Acciones específicas relacionadas con las habilidades y competencias de los conocimientos**	Incentivos, bonificaciones y procedimientos de solicitud Buenas prácticas e incentivos **Contenidos especializados adicionales** Intervenciones a coste cero Compras colectivas renovables para consumidores vulnerables **Acciones específicas relacionadas con la formación/protocolos de actuación**	
		Habilidades relacionales y empatía	**Transversal** (cognitiva y de conducta) Consultar competencias de **"Comunicación y asesoramiento al consumidor"** y el área de resultados del aprendizaje	
Comunicación y asesoramiento al	Asesorar sobre energía en general y sobre cuestiones específicas Aconsejar sobre el uso apropiado de los sistemas energéticos Informar sobre las formas de pago de gas y electricidad Asesorar en hábitos para el ahorro de energía, informes personalizados, "Guías de la energía en el hogar" Promover la interacción de igual a igual Apoyar la creación de grupos de compras Organizar reuniones/talleres Realizar guías/folletos	(Oral, Auditiva y de Escritura) Habilidades y competencias de comunicación Comunicación con el personal técnico y no técnico Planificación de eventos y habilidades de organización Empatía Personalidad fácilmente accesible Inteligencia social Habilidades relacionales (empatía, comunicación efectiva, etc.) Competencias relacionadas con las propuestas de oportunidades para mejorar la eficiencia energética	Comunicación y competencias relacionales Habilidades y competencias de comunicación (también escritas, telefónicas i de TIC) Competencias relacionales (desde la autoconciencia y la gestión hasta la resolución de problemas y la comunicación no verbal) Inteligencia social y competencias empáticas Habilidades de comunicación oral, escrita i "a distancia" Promover y organizar reuniones y eventos	**10-20**

	Preparar materiales informativos, presentaciones u otras herramientas de comunicación Valorar la interacción efectiva entre los interesados	Capacidad de analizar el contexto en el que actúa Capacidad de observar, medir, analizar y sintetizar Capacidad de adaptarse a las situaciones Habilidades y competencias de comunicación (también escritas, telefónicas i de TIC) Habilidades relacionales y competencias empáticas		

Annex 4 –The qualification schema of the Home Energy Advisor (UK)

1. Home Energy Advisor profile

1.1 A first identikit

An initial **HEA identikit** has been drawn up as a starting point for the HEA profile and training course definition activity, to define a first frame and "guide" for the analysis of the national contexts and for the interviews with selected stakeholders.

ASSIST proposes the development and evaluation of an innovative professional profile, the Home Energy Advisor (HEA) who may work within **energy, social and institutional organizations** as well as for private energy market actors such as energy companies.

The starting identikit defines the HEA as an advisor that has direct contacts with the target group (vulnerable consumers) to provide energy efficiency support to vulnerable consumers and more specifically to energy poor consumers. The HEA delivers information, support and advice to them in an easy, comprehensive and practical manner to improve their energy consumption behaviours and also facilitate access for them to supporting financial measures/incentives.

Although there will be differences in each working context, there are three main roles and activities of the HEA:

- energy consumption behaviour analysis;
- energy behaviour support and check-up;
- advice and communication to consumers.

The identification of these first "macro-activities clusters" has guided the definition of the profile and the consequent (desk and in-field) research frame and guidelines. Activities (and sub-activities) identified within these three main clusters have then been correlated with competences requirements.

1.2 HEA professional profile

The activities carried out within the ASSIST project have enabled the modification, specification and detailing of this first identikit and to "translate" it in terms of specific roles, activities and competences related to the diverse working contexts. The HEA Qualification Schema describes the job and competences characteristics:

- Profile in terms of:
  - HEA roles and working contexts;
  - HEA activities and sub-activities;
  - HEA knowledge, skills and competences;
- Training program: learning outcomes and modules defined according to the competences required for the activities to be undertaken in the diverse HEA working contexts and roles.

It is important to underline that the qualification schema reported in this document is the general common frame which will then be adapted and customized by the partners according to their national contexts as well as the ASSIST strategy to be implemented in the country for the HEA training, network and action.

1.2.1 HEA Occupations and working contexts

The HEA qualification schema describes the HEA occupation, as defined within the European frame of ESCO: "an occupation is a grouping of jobs involving similar tasks and which require a similar "skills set". Occupations should not be confused with jobs or job titles. While a job is bound to a specific work context and executed by one person, occupations group jobs by common characteristics".

In all countries, desk and in field research have confirmed that the introduction of HEA profiles can contribute to tackle energy poverty and the main barriers of the energy market faced by vulnerable consumers. This is "considered true" by stakeholders especially if the HEA is considered as a "supporting / facilitating / mediating role", taking also into account the quite high barrier represented by lack of trust and cultural approach. These points have emerged with different weights among partner countries consistently with the approach and "maturity" on energy poverty.

In all ASSIST countries, within the relative regional and national qualification frames there are not professional profiles similar to the HEA, with two exceptions: **Belgium** (within the Flander qualification frame, the *Energiedecree*) and **UK** (many different HEA similar profiles exist and are defined and detailed also in terms of EQF levels and working contexts). However, in all partners countries, piloting projects focusing similar profiles have been carried out and have been analysed within ASSIST to leverage on lessons learnt and to:

- Better draft the profile in terms of "occupation" ranges/potentials and of expected impact/contribution;
- Analyse and evaluate existing (learning, working, and so on) resources.

The analysis of piloting projects has confirmed the **HEA potential role as mediator or facilitator, working within a multi-professional team**. Moreover, the potential of the HEA within a wider building requalification effort, supporting the building manager (within both the energy auditing and the "relational" roles) has emerged. **HEA is not a "unique" professional profile and, consequently, it cannot be directly integrated within regional/national qualification framework**.

The national research projects (and the compared one) have also strongly confirmed that:

- HEA role **should be intended as "occupation"** (in the ESCO terms as reported)
- HEA cannot represent an "autonomous" professional profile but a **supporting role** within both consumer care and social services and other working contexts;
- HEA role **can be played by some already existing professional profiles** (social assistant or civil servants or consumer association advisor).

As anticipated, HEA can play **different and "integrating" potential occupations within diverse working contexts**. The three main contexts identified by the project (energy, social, institutional) have been confirmed by actors involved who have further detailed them as follow:

4. **Energy sector,** with reference to representative organizations, authorities, energy agencies, energy services companies, energy consultancies and energy utilities. A "sub-sector" in fact can be represented by the same market actors - utilities, DSOs and energy companies in general, which could be interested on a "Corporate Social Responsibility" perspective and/or to improve their services to consumers by employing an HEA and/or training their employees employed within the network of customer care. More specifically, HEA specific occupations within the "energy sector" have been indicated as: contact centres; energy agencies; individual professionals (engineers/other energy-related technical professions).
5. **Social sector** with reference to much diversified contexts and organisations such as: third sector, social departments and services, consumer associations, social organisations and charities (Red Cross, caritas, etc.), housing associations. The most relevant HEA specific occupations within the "social sector" have been indicated as: social services; consumers associations; third sector; social housing and users (where HEA is peer acting with peers).

6. **Institutions** with reference to local/regional social services, health services, environmental education, as well as energy authority and energy institutional agency. Two main HEA "institutional" contexts have emerged as more relevant: Public energy agencies, contact centres, services… related to energy policies/incentives; Municipalities' Technical Offices.

For all the occupations and working contexts:

- **difficulties** in reaching the target of vulnerable consumers. For "social-related" working contexts it is more suitable to reach them but it's more difficult to develop proper technical skills to fully inform and support them. This in turn makes the peer to peer dimension very challenging. The social housing context is potentially the most suitable;
- **need** of keeping a straight differentiation between supporting energy saving vs energy efficiency. HEA can support awareness, competences development and users engagement / empowerment with reference to the energy saving behaviours while for supporting energy efficiency more complex technical skills, belonging to other (existing) energy advising professionals are needed as well as more "deeper" (and more costly and complex) actions on the overall building.

These last considerations confirm the opportunity of considering HEA as working within and enlarged professional teams, to consider the HEA **working context as "enlarged",** where HEA cooperate or support other professionals (i.e., the building manager or the energy contact centres and so on).

1.2.2 HEA Activities and Competences

The main HEA activities have been clustered into three main areas:

- energy behaviour analysis;
- energy saving check-up and support;
- communication and advice to consumers.

The three activities areas have been confirmed in all national research (with reference to both desk and in-field activities) which have also detailed the relevant sub-activities and relevant skills and competence. A comprehensive view of all the evidences collected by the national report in terms of HEA's activities (and sub-activities) and competences (knowledge, skills and competences) for each of the three main HEA action areas is reported in the table below.

The HEA competence has been articulated in terms of modular system correlated to the activities in order to evaluate a common schema and the national diversity. The **articulation and weight of the sub-activities** vary according to the diverse **contexts** of action (energy vs. social vs. institutional) and among **partners countries**. The **modular approach employed** in identifying and describing the HEA activities and sub-activities as well as related competences required, represents the conceptual and operative frame for the definition then of the HEA training, networking and in-field action processes.

	Activities	Knowledge, skills and competences
Energy behaviour analysis	Identify the eventual vulnerability and its main drivers/dimensions Customise the information to the target Gather information (questionnaires, interviews, observation, data review, …) Identify energy consumption points in a household /family unit Analyse the house and electrical appliances Collect supply contracts - interpret domestic fuel cost Analyse consumption history and ordinary/extraordinary maintenance interventions Analyse habits and special needs (e.g. Biotechnology)	Technical knowledge on sector with special reference to: energy system and market retail system home energy uses energy bills and tariffs structures services available in the market renewable energy solutions, costs and funding (basics) Technical knowledge on social system with special reference to: social system structure and services vulnerability dimensions and features fuel poverty (causes/effects and policies/actions) Ability to analyse the context in which operate Ability to observe, measure, analyse and synthesis Ability to adapt to situations Communication & relational skills and competences
Energy check-up & support	Measure the energy use and energy efficiency of a household Identify efficiency/appropriate use systems Realise a "simplified energy check-up" Deliver interesting contacts and list of resources Implement energy saving package/tools to monitor/optimise energy Analyse energy bills and payment options Energy saving behaviours support, such us: "behavioural tips" on how to lower the energy consumption Compare and switching tariffs and/or giving advice on energy contracts	Ability to classify and highlight the relevant uses of energy Energy consumption analysis skills Ability to carry on the simplified energy check-up Ability to calculate energy savings and efficiency improvements Competences related to a "functional analysis" for the consumer typology Competences related to the formulation of opportunities to improve energy efficiency Knowledge and skills related to the identification and access to funding opportunities (incentives, bonuses, ….)

	Identify economic incentive mechanisms + submission requests	
Communication and Advise to Consumers	Advise on general energy information and on specific questions Advise on appropriate use of systems Inform on ways of paying for gas and electricity Communicate energy saving tips and behaviours Prepare personalised reports and/or "Family Energy Guidelines" Promote Peer to peer interaction Support the creation of Purchase Groups Organize meetings/workshops Realize guides/brochures Prepare informative materials, presentations or other communication tools Evaluate effective interaction among stakeholders	Communication skills and competences (Oral, Listening and Written) Communication with technical and non-technical personnel Event planning and organization Knowledge of purchasing groups Empathy Easily approachable personality Social intelligence Communication skills and competences (also written, phone, ICT mediated). Writing skills (presentations, …) Relational skills (empathy, effective communication, ….) Competences related to the proposition of opportunities to improve energy efficiency

2. "Home Energy Advisor" Training

All HEA relevant working contexts and roles call for the need of defining, delivering and constantly updating effective training programs. Starting from the HEA requirements, a modular ASSIST program has been built that enables to guarantee:

- a common EU based professional and training frame (also with reference to competences recognition, ECVETs, professional mobility and so on);
- a national customization according to the HEA: background/entry level (unemployed, vulnerable consumer, social operator, help desk operator, and so on); working contexts (social services, help desks, social housing and so on).

In each country **75 HEAs will be trained (except in UK where 6 HEA will be trained)** and the mix of the participants of the training course, future HEA figures, will vary from country to country, in terms of typology of targets involved (in terms of entry level and potential occupational context) and relative numbers.

Within the national training guidelines (D3.2) the specific mix of targets involved as well as the relative training programs will be described, comprehensive of the methodological (i.e. distance vs in presence per unit/module) and operative (i.e. target engagement actions) choices. Although there will be target differences between countries of the training strategy related to the type of the HEA, it is important to underline that in each country also vulnerable consumers will undertake the ASSIST training for the HEA in order to activate "peer to peer" support action methodologies. As the vulnerable consumers who will undertake the HEA training may be unemployed professionals, social housing householders, volunteers and so on, their entry level and training needs will differ largely. Therefore, considering the different "typologies" of vulnerable consumers involved in the diverse countries (and within the same country) the ASSIST training for the vulnerable consumers has been defined according to the overall country strategy defined.

Starting from the analysis of HEA's roles, activities and competences clustered in the three main areas (analysis, check-up, and communication), a modular system of learning outcomes and training modules is defined

Consistently with the three activities, three main competences areas are required to the HEA: **technical, social, relational.** Knowledge and skills are required on energy "technicalities" (including all the competences required from the HEA advising role and in field action) the on social system (including the vulnerability issues). The weights of the technical, social and relational dimensions within the course has been very challenging due to the different perspectives of the various stakeholders involved. Additionally, training needs on behavioural aspects on energy consumption and strong relational competences are needed for all. In all contexts the need of delivering dedicated training is stressed as crucial point, with special reference to the development of proper "relational", communication, emphatic competences when dealing with consumers and vulnerable consumers. The **need of emphasizing the relational dimension** has been highlighted, with different focus together with the relevance of the technical dimensions (both in terms of technical advising role and of required technical competences).

Further a special focus on the need to balance the three HEA dimensions (technical - social - relational) needs to be taken into account when analysing the role of HEA within **contact centres** (of energy companies or agencies; of consumers associations; of public institutions such as the ones of National Energy Authorities). In these cases, the technical and relational skills of HEA must be highly developed to carry out phone and written communication.

Last but not least, **training in the following areas** may also be crucial especially if the trained HEA will be working in specific sectors: health and safety; safeguarding; data protection and confidentiality and data systems linked to the programme; company policies and procedure.

The choice of including and how these topics in the ASSIST HEA course will be detailed in the single national training guidelines (within the general ASSIST training course hours have not been allocated for these topics). Finally, HEA training program foresee a common "**ASSIST HEA - Introductive module**" to present to all the trainees (whatever their background and knowledge and skills):

- ASSIST model based on the figure of the HEA;
- ASSIST training program and training platform;
- ASSIST supporting resources such as: Project factsheet, communication to consumer (domestic energy related informative resources targeting consumers);
- ASSIST action (resources to be used in delivering advice to vulnerable consumers) and HEA Networking (resources on the functioning of the network and its advantages).

A modular system of learning outcomes and training modules has been defined and the following table represents the general structure of ASSIST HEA training course which will be adapted to each national context and detailed in the National Training Strategy guidelines (D3.2) according to: specific HEA working contexts (social services vs help desks vs social housing and so on); entry profile (unemployed, vulnerable consumer, social operator, help desk operator, and so on). As a general HEA training frame, the following table reports:

- **Learning outcomes** related to the knowledge, skills and competences requirements;
- **Modules / contents** of each learning outcome and, for each a **timeframe duration range**. Considering the average of the duration timeframe of each module, the overall ASSIST HEA training program will last 36 hours (plus 4 hours of the introductive module). In each country, according to the specific features of target (competences entry level) and contexts (sectoral and occupational), the module length will be defined.

Activities		Knowledge, skills and competences	Learning Outcomes/ Modules/Contents	Hours
ASSIST HEA Introductive Module		Illustrate the ASSIST model based on the figure of the HEA; Present the ASSIST training program and training platform; Present ASSIST supporting resources		**4 (2-4)**
Energy behaviour analysis	Identify the eventual vulnerability and its main drivers/dimensions Customise the information to the target Gather information (questionnaires, interviews, observation, data review, …) Identify energy consumption points in a household /family unit Analyse the house and electrical appliances Collect supply contracts and energy transfer & interpret domestic fuel cost Analyse consumption history and ordinary/extraordinary maintenance interventions Analyse habits and special needs (e.g. Biotechnology)	Technical knowledge on energy sector with special reference to: ▪ energy system and market ▪ retail system ▪ home energy uses ▪ energy bills and tariffs structures ▪ services available in the market	**Basic Knowledge on Energy Sector** The energy sector (basic knowledge on the sector structure; focus on the retail system and on the main actors involved, including the authorities and consumers help desks; services available in the market) Legislation and regulations (general framework of relevant: legislation on energy supply; regulation on energy trading and energy policies, including EU and national policies; energy bills and tariffs structures) Energy consumption and Energy saving (basic knowledge on energy consumption statistics and paths; introduction to energy indicators and energy efficiency indicators) Home energy uses (Lighting, gas….) systems, household appliances and devices	**6-12**
		Technical knowledge on social system with special reference to: ▪ social system structure and services ▪ vulnerability dimensions and features ▪ specific regulation to protect vulnerable consumers ▪ fuel poverty (causes/effects and policies/actions)	**Basic Knowledge on Social System and Vulnerability** The Social System (basic knowledge on: social system structure and actors; third sector and social services; general framework of relevant legislation and regulation) "Consumers" system (association, services, regulation) Social Programs, Policies and Actions (basic knowledge on existing programs, policies and interventions, main actors and procedures related to the services access (including a first	**6-12**

			overview of incentives, funding and supporting services for social system targets) Vulnerability and Energy Poverty (main framework on vulnerability and its features both at EU and National levels with a focus on energy poverty, including main statistics of the phenomenon, targets included, vulnerability relevant dimensions; health and social results of vulnerability) National/Local existing measures, protocols, … to protect vulnerable consumers (specific regulations)	
Energy check-up & support		Ability to analyse the context in which operate Ability to observe, measure, analyse and synthesis Ability to adapt to situations Communication/relational skills and competences	**Transversal** (cognitive and behavioural) See "**Communication and advise to consumers"** competences and learning outcomes area	
	Measure the energy use and energy efficiency of a household Identify efficiency/appropriate use systems Realise a "simplified energy check-up" Deliver interesting contacts and list of resources Implement energy saving package/tools to monitor/optimise energy Analyse energy bills and payment options Compare tariffs and switching mechanisms and tariffs and/or giving advice on energy contracts Identify economic support/incentive mechanisms + submission of financing requests	Ability to classify and highlight the relevant uses of energy Ability to carry on the simplified energy check-up that, in turn, call for energy consumption analysis skills Ability to calculate energy savings and efficiency improvements Competences related to a "functional analysis" for the consumer typology Competences related to the formulation of opportunities to improve energy efficiency Knowledge of purchasing groups Knowledge and skills related to the identification and access to funding opportunities (incentives, bonuses, ….); **Specific Action(s) related knowledge skills and competences**	**Refreshing communication and action resources** **Energy Behaviour Check-up** Energy consumption habits Domestic energy consumption Introduction to domestic energy check-up How to develop a simplified check-up First level monitoring activities and tools **Energy Behaviours Support** Energy behaviours and tips Contracts - Energy bills Analysis Supporting Energy "Funding" Incentives, Bonus and access procedures Best Practices and Incentives Database	**14-30**

			Additional specialised contents Zero cost interventions Purchasing groups Renewable energies for vulnerable consumers **Specific Action(s) related training/protocols of action(s)**	
		Relational skills and emphatic competences	**Transversal** (cognitive and behavioural) See "**Communication and advise to consumers"** competences and learning outcomes area	
Communication and Advise to Consumers	Advise on general energy information and on specific questions Advise on appropriate use of systems Inform on ways of paying for gas and electricity Energy saving behaviours support, such us "behavioural tips" on how to lower the energy consumption; personalised reports; "Family Energy Guidelines" Promote Peer to peer interaction Support the creation of Purchase Groups Organize meetings/workshops Realize guides/brochures Prepare informative materials, presentations or other communication tools Valorise effective interaction among stakeholders	(Oral, Listening and Written) Communication skills and competences Communication with technical and non-technical personnel Event planning and organization skills Empathy Easily approachable personality Social intelligence Relational skills (empathy, effective communication,….) Competences related to the proposition of opportunities to improve energy efficiency KSC requirements from activities related to the previous two activity areas: Ability to analyse the context in which operate Ability to observe, measure, analyse and synthesis Ability to adapt to situations Communication skills and competences (also written, phone, ICT mediated) Relational skills and emphatic competences	Communication and relational competences Communication skills and competences (also written, phone, ICT mediated). Relational competences (from self-awareness and management to problem solving and not verbal communication) Social intelligence and emphatic competences Oral, Written and "distance" communication skills Promoting and organizing meetings and events	**10-20**

Annex 5 – Schemat kwalifikacji HEA. Opis międzynarodowy (PL)

1. Profil Doradcy Energetycznego dla gospodarstw domowych DDE

1.1 Pierwsza identyfikacja

Początkowa identyfikacja Domowych Doradców Energetycznych – DDE (eng.: Home Energy Advisor - HEA) została wykorzystana jako punkt wyjścia dla przygotowania profilu DDE oraz działań służących opracowaniu kursu szkoleniowego. Dzięki temu przygotowane zostaną ramy i "przewodnik" do analizy kontekstów krajowych oraz rozmowy z wybranymi interesariuszami.

ASSIST proponuje rozwój i waloryzację innowacyjnego profilu zawodowego, Domowego Doradcy Energetycznego (HEA), który może pracować w organizacjach związanych z energetyką, organizacjach społecznych i instytucjonalnych, a także prywatnych firmach sektora energetycznego, takich jak spółki energii.

Początkowo definiujemy DDE jako doradcę, który posiada bezpośrednie kontakty z grupą docelową (odbiorcy/konsumenci wrażliwi), aby udzielać wsparcia w obszarze efektywności energetycznej odbiorcom wrażliwym, a w szczególności ubogim energetycznie. DDE dostarcza informacje, udziela wsparcia i porad takim klientom w sposób prosty, zrozumiały i praktyczny, wpływając pozytywnie na ich zachowania dotyczące zużycia energii, a także ułatwia im dostęp do środków/możliwości wsparcia finansowego.

Pomimo różnic w każdym roboczym kontekście, DDE spełnia trzy zasadnicze role i prowadzi działania takie jak:

- analiza zachowań użytkowania energii;
- wsparcie i sprawdzanie zachowań użytkowania energii;
- doradztwo i komunikacja z konsumentami.

Identyfikacja pierwszych "klastrów makro-działań" doprowadziła do powstania definicji profilu, a następnie (w teorii i w praktyce) ramowych działań i wskazówek. Czynności (i mniejsze działania) zidentyfikowane w ramach tych trzech głównych klastrów zostały następnie powiązane z wymaganiami kompetencyjnymi.

1.2 Profil zawodowy HEA

Działania prowadzone w ramach projektu ASSIST pozwoliły na modyfikację, specyfikację i uszczegółowienie początkowych założeń odnośnie DDE oraz przełożenia go na poszczególne role, czynności i kompetencje powiązane z różnymi roboczymi kontekstami.

Schemat Kwalifikacji DDE opisuje pracę i kompetencje:

- Profil w rozróżnieniu na:
  - Role DDE i konteksty robocze;
  - Czynności i mniejsze działania DDE;
  - Wiedzę DDE, umiejętności i kompetencje;
- Program szkoleń: wyniki nauki i moduły zdefiniowane zgodnie z kompetencjami wymaganymi dla czynności niezbędnych do wykonania w różnych kontekstach roboczych DDE i w różnych rolach.

Istotne jest, aby podkreślić, że schemat kwalifikacji podany w niniejszym dokumencie stanowi ogólne ramy, które zostaną później dostosowane i zaadaptowane przez partnerów do uwarunkowań krajowych, a także strategii projektu ASSIST w celu wdrożenia w kraju na potrzeby szkoleń DDE, networkingu i różnych działań.

1.2.1 ZAWOdy DDE i konteksty robocze;

Schemat kwalifikacji DDE opisuje zawód DDE zgodnie z definicją w ramach Europejskiej klasyfikacji umiejętności/kompetencji, kwalifikacji i zawodów (ESCO), która brzmi: "zawód obejmuje posady wymagające podobnych zadań, które wymagają podobnych "zestawów umiejętności". Zawodów nie powinno się mylić z posadami lub stanowiskami. O ile posada jest powiązana ze szczególnym kontekstem pracy i wykonywana jest przez jedną osobę, zawody grupują posady o podobnych cechach."

We wszystkich krajach, badania teoretyczne i praktyczne potwierdziły, że wprowadzenie profilu DDE może przyczynić się do zwalczania ubóstwa energetycznego i głównych barier na rynku energii, które napotykają odbiorcy wrażliwi. Jest to "uznawane za prawdę" przez interesariuszy, szczególnie jeżeli DDE uważana jest za osobę, która pełni "rolę wspierającą/pomagającą/mediacyjną", biorąc również pod uwagę dość poważną barierę, jaką jest brak zaufania i podejście kulturowe. Punkty te pojawiły się z różnymi wagami wśród krajów partnerskich zgodnie z podejściem i "dojrzałością" w kwestii ubóstwa energetycznego.

W żadnym kraju uczestniczącym w projekcie ASSIST, w ramach kwalifikacji regionalnej i krajowej, nie istnieje podobny do DDE profil zawodowy, z dwoma wyjątkami: **Belgia** (w ramach kwalifikacji Flander *Energiedecree*) oraz **UK** (gdzie istnieje wiele różnych profili podobnych do DDE i są one zdefiniowane szczegółowo również na poziomach EQF i w kontekstach roboczych). We wszystkich krajach partnerskich realizowane są projekty pilotażowe dotyczące podobnych profili. Zostały one przeanalizowane w ramach projektu ASSIST, w celu skorzystania z zebranych doświadczeń oraz w celu:

- sporządzenia lepszego profilu w ramach zakresu/potencjału "zawodu" i spodziewanego wpływu/wkładu;
- zwaloryzowania istniejących zasobów (szkoleniowych, pracowniczych itp.)

Analiza projektów pilotażowych potwierdziła **potencjalną rolę DDE jako mediatora i doradcy współpracującego z zespołem różnych profesjonalistów**. Co więcej, zauważono potencjał DDE w zakresie szerszych działań związanych z przekwalifikowaniem budynków, wspierających zarządcę budynku (zarówno w zakresie audytu energetycznego, jak podobnych działań). **DDE nie jest "unikalnym" profilem zawodowym, a co za tym idzie nie może być bezpośrednio włączona w ramy kwalifikacji regionalnej/narodowej**.

Badania krajowe (i porównywalne) również mocno potwierdziły, że:

- rola DDE **powinna być określana jako "zawód"** (według terminów ESCO)
- DDE nie może stanowić "autonomicznego" profilu zawodowego, ale **może pełnić rolę wsparcia** zarówno w obszarze dbałości o odbiorcę, jak i wsparcia socjalnego, jak również w innych kontekstach roboczych;
- rola DDE **może być pełniona w ramach już istniejących profilów zawodowych** (asystent socjalny, urzędnik służby cywilnej lub doradca stowarzyszeń konsumentów).

Zgodnie z oczekiwaniami, DDE może odrywać **różne role i integrować potencjalne zawody w różnych kontekstach roboczych**. Trzy główne konteksty zidentyfikowane w projekcie (energetyczny, społeczny, instytucjonalny) zostały potwierdzone przez podmioty zaangażowane, które szczegółowo opisały je w następujący sposób:

7. **Sektor Energii,** w odniesieniu do organizacji reprezentatywnych, urzędów, agencji energii, przedsiębiorstw usług energetycznych, konsultantów ds. energii i spółek energetycznych. „Sub-sektor" może być faktycznie reprezentowany przez tych samych uczestników rynku - przedsiębiorstwa użyteczności publicznej, operatorów systemów dystrybucyjnych i ogólnie przedsiębiorstwa energetyczne, które mogą być zainteresowane "społeczną odpowiedzialnością biznesu" lub/i poprawą swoich usług poprzez zatrudnienie DDE

lub/i szkoleniem swoich pracowników w ramach sieci dbałości o klienta. Poszczególne zawody DDE w ramach "sektora energii" zostały określone jako: centra kontaktowe; agencje energii; profesjonaliści (inżynierowie/inne zawody techniczne związane z energią).

8. **Sektor społeczny** w odniesieniu do bardzo zróżnicowanych kontekstów i organizacji, takich jak: trzeci sektor, wydziały/departamenty społeczne oraz usług, stowarzyszenia konsumentów, organizacje społeczne i charytatywne (czerwony krzyż, caritas itp.), spółdzielnie mieszkaniowe. Najodpowiedniejsze zawody DDE w "sektorze społecznym" zostały wskazane jako: usługi społeczne; stowarzyszenia konsumentów; trzeci sektor; mieszkalnictwo socjalne i podmioty au pair (gdzie DDE współpracuje z rówieśnikami).
9. **Instytucje** w odniesieniu do lokalnych/regionalnych usług społecznych, służby zdrowia, edukacji ekologicznej, a także instytucji energetycznych i agencji energetycznych. Dwa główne konteksty "instytucjonalne" DDE: Publiczne agencje energetyczne, centra kontaktowe, usługi... związane z polityką energetyczną/ zachętami; Miejskie Biura Techniczne.

Dla wszystkich zawodów i kontekstów roboczych:

- **trudności** w dotarciu do odbiorców wrażliwych. W odniesieniu do "społecznych" kontekstów roboczych łatwiej jest do nich dotrzeć, ale trudniej rozwinąć właściwe umiejętności techniczne, tak aby w pełni ich informować i wspierać. Sprawia to, że podejście peer to peer jest wielkim wyzwaniem. Kontekst mieszkalnictwa socjalnego jest potencjalnie najbardziej odpowiedni.
- **potrzeba** ścisłego rozróżnienia pomiędzy wspieraniem oszczędzania energii, a efektywnością energetyczną. DDE może wspierać wzrost świadomości, kompetencji oraz zaangażowanie użytkowników w odniesieniu do zachowań służących oszczędzaniu energii. Jednak jeżeli chodzi o wspieranie efektywności energetycznej potrzebne są bardziej złożone umiejętności techniczne, które posiadają inni (istniejący) profesjonalni doradcy w sektorze energii, a także "głębsze" (oraz bardziej kosztowne i skomplikowane) działania w całym budynku.

Powyższe informacje potwierdzają, że warto rozważyć DDE jako pracującego w większym zespole profesjonalistów, gdzie **kontekst roboczy DDE określamy jako "powiększony",** a DDE współpracuje z innymi profesjonalistami, lub ich wspiera (np. administratora budynku lub energetyczne centra kontaktowe itp.).

1.2.2 Działania i Kompetencje DDE

Głównie działania DDE zostały zgrupowane w trzy najważniejsze obszary:

- analiza zachowań dotyczących energii;
- sprawdzanie i wsparcie oszczędzania energii;
- komunikacja i doradzanie klientom.

Te trzy obszary działań zostały potwierdzone we wszystkich badaniach krajowych (w odniesieniu do działań zarówno teoretycznych, jak i praktycznych), które rozróżniają także odpowiednie poddziałania oraz umiejętności i kompetencje. Kompleksowy przegląd wszystkich dowodów zebranych w raporcie krajowym pod kątem działań (i poddziałań) DDE oraz kompetencji (wiedzy, umiejętności i kompetencji) dla każdego z trzech głównych obszarów działania DDE przedstawiono w poniższej tabeli.

Kompetencje DDE zostały opisane w systemie modułowym, skorelowanym z czynnościami, w celu jednoczesnej waloryzacji wspólnego schematu i różnorodności w poszczególnych krajach. **Wyrażenie i waga poddziałań** różnią się w zależności od **kontekstów** działań (energia vs. społeczne vs. instytucjonalne) i w zależności od **krajów partnerskich**. **Modułowe podejście stosowane** w identyfikacji i opisywaniu działań i poddziałań DDE, a także związanych z nimi wymaganych kompetencji, stanowi ramy koncepcyjne i operacyjne dla definicji szkolenia, sieci i działań w terenie.

	Czynności	Wiedza, umiejętności i kompetencje
Analiza zachowań dotyczących energii	• Zdefiniuj słabe punkty i ich główne przyczyny/rozmiar • Dopasuj informacje do grupy docelowej • Zbierz informacje (ankiety, wywiady, obserwacje, dane, recenzje,...) • Zidentyfikuj punkty zużycia energii w gospodarstwie domowym • Przeanalizuj sprzęt AGD i RTV • Zbierz umowy o dostawę energii - zinterpretuj koszty paliw • Przeanalizuj historię zużycia i zwykłe/nadzwyczajne zmiany w dostawie energii • Przeanalizuj zwyczaje i potrzeby szczególne (np. Biotechnologia)	Wiedza techniczna na temat sektora ze szczególnym odniesieniem do: • systemu energii i rynku • systemu detalicznego • zużycia energii w domu • rachunków za energię i struktury taryfikacji • usług dostępnych na rynku • rozwiązań odnośnie wykorzystania energii odnawialnej, kosztów i finansowania (podstawy)
		Wiedza techniczna na temat systemu socjalnego ze szczególnym odniesieniem do: • struktury systemu socjalnego i usług • skala i cechy wrażliwości • ubóstwa energetycznego (przyczyny/skutki i polityka/działania)
		• Zdolność do analizy kontekstu działania • Zdolność do obserwacji, miary, analizy i syntezy • Zdolność do dostosowywania się do sytuacji • Umiejętności i kompetencje komunikacji i relacji
Test energii &	• Wykonaj pomiar zużycia energii i efektywności energetycznej w gospodarstwach domowych	• Zdolność klasyfikacji i wyodrębnienia koniecznego zużycia energii • Umiejętność analizy zużycia energii

	Zidentyfikuj wydajności/odpowiedniość korzystania z systemu Zastosuj "uproszczony test energii" Przedstaw interesujące kontakty i listę źródeł Wprowadź pakiety/narzędzia oszczędzania energii w celu monitorowania/optymalizacji energii Przeanalizuj rachunki za energię i opcje płatności Wsparcie zachowań służących oszczędzaniu energii, takich jak: "wskazówki postępowania" jak obniżyć zużycie energii Porównanie i przełączanie taryf i/lub doradztwo na temat umów związanych z energią. Identyfikacja mechanizmów wsparcia gospodarczego + przygotowanie wniosków	Zdolność przeprowadzania uproszczonego testu energii Zdolność obliczania oszczędności energii i ulepszeń wydajności Kompetencje związane z "analizą funkcjonalną" dla typologii konsumenta Kompetencje związane z formułowaniem możliwości poprawy efektywności energetycznej Wiedza i umiejętności związane z identyfikacją i dostępem do możliwości finansowania (premie, bonusy, ...)
Komunikacja i doradzanie klientom.	Podaj ogólne informacje o energii i odpowiedz na szczegółowe pytania Podaj informacje o prawidłowym korzystaniu z systemów Poinformuj o sposobach płatności za gaz i elektryczność Podaj wskazówki na temat oszczędzania energii i zachowań z tym związanych Przygotuj spersonalizowane raporty i/lub "Wskazówki dla Rodziny na temat korzystania z energii" Promuj interakcję Peer to Peer Wesprzyj tworzenie Grup Zakupowych Organizuj spotkania/warsztaty Przygotuj przewodniki/broszury	Umiejętności i kompetencje komunikacyjne (Mówienie, Słuchanie i Pisanie) Komunikacja z personelem technicznym i nie-technicznym Planowanie i organizacja imprez Znajomość grup zakupowych Empatia Przyjazna osobowość Inteligencja społeczna Umiejętności i kompetencje komunikacyjne (także pisemne, telefoniczne, ICT, mediacyjne) Umiejętność pisania (prezentacje, ...) Umiejętności tworzenia relacji (empatia, skuteczna komunikacja, ...) Kompetencje związane z propozycjami możliwości poprawy efektywności energetycznej energetycznej

	• Przygotuj materiały informacyjne, prezentacje lub inne narzędzia komunikacji • Przedstaw waloryzację skutecznej interakcji pomiędzy interesariuszami	

2. Szkolenie Domowego Doradcy Energetycznego (DDE)

Wszystkie konteksty robocze i role DDE wymagają zdefiniowania, przygotowania i stałego uaktualniania skutecznych programów szkoleniowych. Począwszy od wymagań odnośnie DDE, zbudowano modułowy program ASSIST, który gwarantuje:

- ramy szkoleń zawodowych oparte na schematach UE (również w odniesieniu do rozpoznawania kompetencji, skutków, mobilności zawodowej itp);
- uwzględnienie w założeniach odnośnie DDE sytuacji krajowej: tła/poziomu wyjściowego (bezrobotny, najsłabszy klient, operator społeczny, itd); kontekst roboczy (usługi społeczne, helpdesk, mieszkalnictwo społeczne itd.).

W każdym kraju w **szkoleniu weźmie udział 75 DDE (z wyjątkiem UK, gdzie przeszkolonych zostanie 6 DDE),** który zostaną wytypowani spośród różnych grup, w zależności od kraju będą się różnić zarówno pod względem typologii grup docelowych (odnośnie poziomu początkowego i potencjalnego kontekstu zawodowego) oraz liczebności.

W ramach krajowych wytycznych szkoleniowych (D3.2) zostanie opisana specyficzna kombinacja celów, jak również odpowiednie programy szkoleniowe uwzględniające czynniki metodologiczne i operacyjne. Pomimo różnic pomiędzy krajami dotyczących DDE, ważne jest, aby podkreślić, że w każdym kraju, również odbiorcy wrażliwi podejmą szkolenia w ramach projektu ASSIST, tak aby wdrożyć metodologię "peer to peer". Jako że konsumenci wrażliwi, którzy wezmą udział w szkoleniach DDE, mogą być osobami bezrobotnymi, właścicielami mieszkań socjalnych, wolontariuszami itd., ich wyjściowy poziom wiedzy i kompetencji oraz potrzeby szkoleniowe mogą się znacznie różnić. W związku z tym, biorąc pod uwagę różne "typologie" wrażliwych konsumentów, zaangażowanych w różnych krajach (i w tym samym kraju), szkolenie ASSIST dla tej grupy zostało zdefiniowane zgodnie z ogólną strategią całego kraju.

Począwszy od analizy ról DDE, czynności i kompetencje zgrupowane w trzech głównych obszarach (analizy, testy, komunikacja), zdefiniowano modułowy system nauki i modułów szkoleniowych.

Równolegle z trzema czynnościami, wymagane są trzy obszary kompetencji dla DDE: **techniczne, socjalne, relacyjne.** W aspekcie spraw technicznych wymagane są umiejętności i wiedza (w tym wszystkie kompetencje wymagane od DDE jako doradcy podczas działań praktycznych) na temat systemu socjalnego (w tym kwestie wrażliwe). Waga aspektów technicznych, socjalnych i relacyjnych w procesie przygotowania szkoleń była trudna do oszacowania ze względu na różne perspektywy wszystkich zainteresowanych stron. Dodatkowo, wszystkim potrzebne są szkolenia z zachowań dotyczących zużycia energii oraz szerokie kompetencje relacyjne. We wszystkich kontekstach, podkreśla się potrzebę przygotowania szkoleń dedykowanych, ze szczególnym uwzględnieniem rozwoju właściwych kompetencji "relacyjnych", komunikacyjnych, empatycznych niezbędnych w czasie pracy z odbiorcami i odbiorcami wrażliwymi. Podkreślona została również **potrzeba uwzględnienia wymiarów relacyjnych**, z różnym naciskiem na istotność wymiaru technicznego (zarówno pod względem doradztwa technicznego, jak i wymaganych kompetencji technicznych).

Dalej zwrócono uwagę na potrzebę równowagi pomiędzy trzech wymiarami (technicznym - socjalnym - relacyjnym), które powinny być wzięte pod uwagę przy analizie roli DDE w **centrach kontaktowych** (np. spółek energetycznych lub agencji; stowarzyszeń konsumentów; instytucji publicznych, takich jak Krajowe Stowarzyszenia Energii). W takich przypadkach, umiejętności techniczne i relacyjne DDE muszą być wysoko rozwinięte, biorąc pod uwagę konieczność prowadzenia komunikacji telefonicznej i pisemnej.

Na koniec, choć nie należy tego traktować jako najmniej ważne, podkreślono konieczność **szkoleń w obszarze** ochrony danych i poufności, systemów danych połączonych z programem; polityk i procedur szczególnie, jeśli DDE będzie pracował w takich sektorach jak sektorach: zdrowie i bezpieczeństwo czy zabezpieczenia.

Ostateczny wybór zakresu tematów oraz sposobu ich przedstawienia na szkoleniach w ramach projektu ASSIST będzie podany w przewodnikach dla szkoleń przygotowanych dla poszczególnych krajów (w ramach ogólnych kursów szkoleniowych ASSIST nie nastąpiło określenie czasu trwania poszczególnych tematów). Ostatecznie, program szkoleniowy przewiduje wspólny moduł "**ASSIST DDE - moduł wstępny**" do zaprezentowania wszystkim uczestnikom szkoleń (bez względu na ich pochodzenie, wiedzę i umiejętności), który będzie obejmował:

- model ASSIST oparty o dane dotyczące DDE;
- program szkoleniowy ASSIST i platformę szkoleniową;
- elementy wsparcia ASSIST, takie jak: informacje o projekcie, informacje skierowane do odbiorcy (informacje na temat energii w gospodarstwach domowych skierowane do konsumentów);
- działania ASSIST (zasoby do wykorzystania przy doradztwie dla konsumentów wrażliwych) i sieć DDE (źródła informacji o funkcjonowaniu sieci i korzyści płynących z członkostwa).

Modułowy system szkoleń i moduły szkoleń zostały zdefiniowane, a poniższa tabela przedstawia ogólną strukturę kursów szkoleniowych ASSIST DDE, które zostaną

dostosowane do kontekstów krajowych i uszczegółowione we przewodnikach odnośnie Krajowych Strategii Szkoleniowych (D3.2) według: poszczególnych kontekstów roboczych DDE (usługi socjalne vs pomocowe i mieszkalnictwo socjalne itp.); profilu wejściowego (bezrobotni, odbiorcy wrażliwi, pracownicy socjalni, recepcjoniści itp.) Jako ogólną ramy szkoleń DDE, poniższa tabela przedstawia:

- **Wyniki szkoleń** dotyczące wymagań odnośnie uzyskanej wiedzy, umiejętności i kompetencji;
- **Moduły / treść** każdego rezultatu szkolenia oraz dla każdego szkolenia **ramy czasowe**. Biorąc pod uwagę średni czas trwania każdego modułu program szkoleniowy ASSIST DDE będzie 36 godzin (plus 4 godziny modułu wstępnego). W każdym kraju, w oparciu o specyficzne warunki i cele (wyjściowy poziom kompetencji) oraz kontekst (sektorowy i zawodowy), czas poszczególnych modułów zostanie zdefiniowany.

Czynności		Wiedza, umiejętności i kompetencje	Wyniki nauki/moduły/treść	Czas trwania
Moduł Wstępny ASSIST DDE		Zobrazuj model ASSIST na podstawie danych dotyczących DDE; Przedstaw program szkoleniowy ASSIST i platformę szkoleniową; Przedstaw elementy wsparcia ASSIST		**4. (2-4)**
Analiza zachowań dotyczących energii	Zdefiniuj słabe punkty i ich główne przyczyny/rozmiar Dopasuj informacje do grupy docelowej Zbierz informacje (ankiety, wywiady, obserwacje, dane, recenzje,...) Zidentyfikuj punkty zużycia energii w gospodarstwie domowym Przeanalizuj sprzęt AGD i RTV Zbierz umowy zaopatrzenia w energię - zinterpretuj koszty Przeanalizuj historię zużycia energii i zwykłe/nadzwyczajne zmiany Przeanalizuj zwyczaje i potrzeby szczególne (np. Biotechnologia)	Wiedza techniczna na temat sektora energii ze szczególnym odniesieniem do: ▪ systemu energii i rynku ▪ systemu detalicznego ▪ zużycia energii w domu ▪ rachunków za energię i struktury taryfikacji ▪ usługi dostępne na rynku	**Podstawowa Wiedza o Sektorze Energii** Sektor energii (podstawowa wiedza na temat struktury sektora; ze szczególnym uwzględnieniem systemu detalicznego i głównych interesariuszu, w tym urzędów i help desków dla konsumentów; usług dostępnych na rynku) Prawodawstwo i przepisy (ogólne przepisy prawne na temat dostaw energii; przepisy na temat handlu energii i polityki energetycznej, w tym prawodawstwo UE i polityka krajowa; rachunki za energię i struktura taryf) Zużycie energii i oszczędzanie energii (podstawowa wiedza na temat statystyk zużycia energii; wskaźników energetycznych oraz wskaźników efektywności energetycznej) Zużycie energii w gospodarstwach domowych (oświetlenie, gaz....), sprzęt AGD i RTV	**6 -12**
		Wiedza techniczna na temat systemu socjalnego ze szczególnym odniesieniem do: ▪ struktury systemu socjalnego i usług ▪ skala i cechy ubóstwa ▪ szczególne przepisy ochrony odbiorców wrażliwych	**Podstawowa Wiedza na temat Systemu Socjalnego i Ubóstwa** System Socjalny (podstawowa wiedza na temat: struktury systemu socjalnego i interesariuszy; trzeciego sektora i usług socjalnych; ogólne ramy prawodawstwa i przepisy) System "konsumentów" (stowarzyszenia, usługi, przepisy)	**6 -12**

		▪ ubóstwo energetyczne (przyczyny/skutki i polityka/działania)	Programy Socjalne, Polityka i Działania (wiedza podstawowa na temat obecnych programów i interwencji, głównych odbiorcy i procedur związanych z dostępem do usług (w tym pierwszy przegląd zachęt) Wrażliwość i Ubóstwo Energetyczne (główne ramy na temat wrażliwości i jej cech zarówno na poziomie UE i na poziomach krajowych z naciskiem na ubóstwo energetyczne, w tym główne statystyki zjawiska, cele, rozmiary ubóstwa; skutki zdrowotne i socjalne ubóstwa) Istniejące środki zaradcze na poziomie krajowym/lokalnym, ... w celu ochrony odbiorców wrażliwych (przepisy szczególne)	
		Zdolność do analizy kontekstu działania Zdolność do obserwacji, pomiarów, analizy i syntezy Zdolność do dostosowywania się do sytuacji Umiejętności i kompetencje w komunikacji/relacji	**Przekrojowe podejście** (kognitywne i behawioralne) Patrz obszar kompetencji i rezultatów odnośnie "**Komunikacji i doradztwo dla klientów**"	
Test energii & wsparcie	Zmierz zużycie energii i efektywność energetyczną w gospodarstwach domowych Zidentyfikuj systemy efektywności/właściwego zużycia Zrób "uproszczony test energii" Przedstaw interesujące kontakty i listę źródeł Wprowadź pakiet/narzędzia oszczędzania energii w celu monitorowania/optymalizacji zużycia energii Przeanalizuj rachunki za energię i opcje płatności	Zdolność klasyfikacji i wyodrębnienie koniecznego zużycia energii Zdolność do prowadzenia uproszczonych testów energetycznych, w dalszej kolejności, Umiejętność analizy zużycia energii Zdolność obliczania oszczędności energii i proponowania działań na rzecz efektywności Kompetencje związane z "analizą funkcjonalną" dla odbiorcy Kompetencje związane z określeniem możliwości poprawy efektywności energetycznej	**Zasoby/źródła zmiany komunikacji i działań** **Sprawdzanie zachowań energetycznych** Zwyczaje użytkowania energii Zużycie energii domowej Wprowadzenie do sprawdzania domowego zużycia energii Jak rozwijać uproszczone sprawdzanie Działania i narzędzia monitorowania - pierwszy poziom **Wsparcie Zachowań Energetycznych** Zachowania energetyczne i podpowiedzi Kontrakty - Analiza rachunków za energię	**14 - 30**

	Porównaj taryfy i mechanizmy przełączania taryf i/lub doradź na temat umów związanych z energią Zidentyfikuj mechanizmy wsparcia +przygotuj wnioski	Znajomość grup zakupowych Wiedza i umiejętności związane z identyfikacją i dostępem do możliwości finansowania (premie, bonusy, ...) **Szczególne umiejętności i kompetencje związane z działaniem**	"Finansowanie" wspierające energię Bonusy, premie i procedury dostępu Baz danych najlepszych praktyk i bonusów **Dodatkowe treści specjalistyczne** Działąnia bez-kosztowe Grupy zakupowe Energia odnawialna dla odbiorców wrażliwych **Szczególne działania i szkolenia/protokoły działań**	
		Umiejętności relacyjne i kompetencje empatii	**Przekrojowe podejście** (kognitywne i behawioralne) Patrz obszar kompetencji i rezultatów odnośnie "**Komunikacji i doradztwo dla klientów**"	
Komunikacja i doradzanie odbiorcom	Podaj ogólne informacje o energii i odpowiedzi na szczegółowe pytania Podaj informacje o prawidłowym używaniu systemów Poinformuj o sposobach płatności za gaz i elektryczność Wspieraj zachowania sprzyjające oszczędzaniu energii, przygotuj "krótkie porady" jak obniżyć zużycie energii; spersonalizowane raporty, "Przewodniki oszczędzania energii dla rodzin" Promuj interakcję Peer to Peer Wesprzyj tworzenie Grup Zakupowych Organizuj spotkania/warsztaty Przygotuj przewodniki/broszury Przygotuj materiały informacyjne, prezentacje lub inne narzędzia komunikacji Przedstaw waloryzację skutecznej współpracy	Umiejętności i kompetencje komunikacyjne (mówienie, słuchanie, pisanie) Komunikacja z personelem technicznym i nie-technicznym Umiejętność planowania i organizacji imprez Empatia Przyjazna osobowość Inteligencja społeczna Umiejętności tworzenia relacji (empatia, skuteczna komunikacja, ...) Kompetencje związane z proponowaniem rozwiązań podnoszenia efektywności energetycznej	Kompetencje komunikacyjne i relacyjne Umiejętności i kompetencje komunikacyjne (także pisemne, telefoniczne, ICT, mediacyjne) Kompetencje relacyjne (od samoświadomości i zarządzania do rozwiązywania problemów i komunikacji niewerbalnej) Inteligencja społeczna i kompetencje empatii Umiejętności komunikacji - mówienie, pisanie i "na odległość" Promocja i organizacja spotkań oraz eventów	**10 - 20**

Annex 6 – HEA Kwalificatieschema. Nationale beschrijving van de HEA (NL)

1. Profiel van de Home Energy Advisor (energieadviseur voor de woning)

1.1 Een eerste identikit

Een initiële **identikit van de HEA** werd opgesteld als vertrekpunt voor de definitie van het HEA-profiel en de opleiding, en als eerste kader en 'gids' voor de analyse van de nationale contexten en de interviews met geselecteerde betrokkenen.

ASSIST stelt de ontwikkeling en valorisatie voor van een innovatief professioneel profiel, de Home Energy Advisor (HEA, energieadviseur voor de woning), die in **energie-, sociale en institutionele organisaties** kan werken, maar ook voor privéactoren op de energiemarkt, zoals energiebedrijven.

De eerste identikit definieert de HEA als een adviseur die directe contacten heeft met de doelgroep (kwetsbare afnemers), om kwetsbare en meer specifiek energiearme afnemers ondersteuning te bieden inzake energie-efficiëntie. De HEA levert hen eenvoudige, volledige en praktische informatie, ondersteuning en adviezen om hun gedrag als energieverbruikers te verbeteren en hun toegang tot financiële steunmaatregelen/incentives te vergemakkelijken.

Hoewel de werkcontexten van elkaar verschillen, heeft de HEA drie belangrijke rollen en activiteiten:

- analyse van het energiegedrag;
- ondersteuning en scan van het energiegedrag;
- advies aan en communicatie met afnemers.

De identificatie van deze eerste 'clusters van macroactiviteiten' diende als leidraad voor de definitie van het profiel en het aansluitende kader en de richtlijnen voor het onderzoek (in de literatuur en op het terrein). De in deze grote clusters geïdentificeerde activiteiten (en subactiviteiten) werden vervolgens met competentievereisten gecorreleerd.

1.2 Professioneel profiel van de HEA

De werkzaamheden in het project ASSIST hebben het mogelijk gemaakt het eerste portret aan te passen, te specificeren en te detailleren, en het te 'vertalen' in termen van aan de verschillende werkcontexten gerelateerde specifieke rollen, activiteiten en competenties. Het HEA-kwalificatieschema beschrijft de kenmerken van de functie en de competenties:

- Profiel in termen van:
  - rollen en werkcontexten van de HEA;
  - activiteiten en subactiviteiten van de HEA;
  - kennis, vaardigheden en competenties van de HEA;
- opleidingsprogramma: leeruitkomsten en modules, gedefinieerd volgens de competenties die de activiteiten van de HEA in de verschillende werkcontexten en rollen vereisen.

Er dient benadrukt dat het in dit document beschreven kwalificatieschema het algemene gemeenschappelijke kader is dat de partners zullen aanpassen aan hun nationale context en aan de in het land geïmplementeerde ASSIST-strategie voor de opleiding, netwerking en actie van de HEA's.

1.2.1 Beroepen en werkcontexten van de HEA

Het HEA-kwalificatieschema beschrijft het beroep van de HEA volgens de definitie van het Europese kader van ESCO: “an occupation is a grouping of jobs involving similar tasks and which require a similar '“skills set”. Occupations should not be confused with jobs or job titles. While a job is bound to a specific work context and executed by one person, occupations group jobs by common characteristics”. (“Een beroep is een groepering van banen met soortgelijke taken die een soortgelijk 'vaardighedenpakket' vereisen. Men mag beroepen niet verwarren met banen of functietitels. Terwijl een baan aan een specifieke werkcontext gebonden is en door één persoon wordt uitgevoerd, groeperen beroepen banen volgens gemeenschappelijke kenmerken.”)

In alle landen hebben literatuur- en veldonderzoek bevestigd dat de invoering van het HEA-profiel kan bijdragen tot de aanpak van energiearmoede en de belangrijkste hindernissen op de energiemarkt waarmee kwetsbare afnemers worden geconfronteerd. Dit wordt door de betrokkenen 'als waar beschouwd', vooral indien de HEA wordt gezien als een 'ondersteunende / faciliterende / bemiddelende rol', waarbij ook de zeer hoge barrière van het gebrek aan vertrouwen en de culturele benadering in aanmerking worden genomen. Deze punten zijn met wisselend gewicht in de partnerlanden naar voren gekomen, consistent met de benadering van en de 'maturiteit' inzake energiearmoede.

In geen enkel land van ASSIST bestaat er in de regionale en nationale kwalificatiekaders een professionele rol die met deze van HEA vergelijkbaar is, op twee uitzonderingen na: **België** (in het Vlaamse kwalificatiekader, het *Energiedecreet*) en het **Verenigd Koninkrijk**

(er bestaan veel verschillende profielen die met dat van HEA vergelijkbaar zijn en ze worden ook in termen van de KQF-niveaus en werkcontexten gedefinieerd en gedetailleerd). Alle partnerlanden hebben echter proefprogramma's uitgevoerd en binnen ASSIST geanalyseerd die op vergelijkbare profielen focussen om de geleerde lessen te benutten en om:

- Het profiel beter op te stellen in termen van het bereik/potentieel van het 'beroep' en van de verwachte impact/bijdrage;
- De bestaande middelen (leren, werken enz.) te valoriseren.

De analyses van de proefprojecten hebben **de potentiële rol van de HEA als bemiddelaar of facilitator in een multiprofessioneel team bevestigd**. Bovendien is het potentieel van de HEA naar voren gekomen in een ruimere inspanning voor de herkwalificatie van gebouwen, als ondersteuning voor de gebouwbeheerder (zowel in de energieaudit als in de 'relationele' rollen). **HEA is geen 'uniek' professioneel profiel en kan bijgevolg niet rechtstreeks in een regionaal/nationaal kwalificatiekader worden geïntegreerd.**

Uit de nationale onderzoeken (en het vergelijkende onderzoek) is ook duidelijk gebleken dat:

- De rol van HEA **als een 'beroep' moet worden gezien** (in de termen van ESCO, zoals al vermeld)
- De HEA geen 'autonoom' professioneel profiel is maar een **ondersteunende rol** in de consumentenzorg, de sociale diensten en andere werkcontexten;
- De rol van de HEA **kan worden ingevuld door sommige bestaande professionele profielen** (sociaal assistent of ambtenaar of adviseur van een consumentenvereniging).

Zoals geanticipeerd kan de HEA **verschillende en 'integrerende' potentiële beroepen uitoefenen in diverse werkcontexten.** De drie belangrijkste contexten die het project heeft geïdentificeerd (energie, sociaal, institutioneel) zijn bevestigd door de betrokken actoren, die ze als volgt verder hebben gedetailleerd:

4. **De energiesector,** met betrekking tot representatieve organisaties, overheden, energieagentschappen, energiedienstbedrijven, energieconsultants en nutsbedrijven in de energie. Dezelfde marktactoren kunnen een 'subsector' vertegenwoordigen – nutsbedrijven, distributienetbeheerders en energiebedrijven in het algemeen die belangstelling kunnen hebben vanuit een perspectief van 'maatschappelijk verantwoord ondernemen' en/of om hun diensten aan de afnemers door middel van de inzet van een HEA te verbeteren en/of om hun

medewerkers in het netwerk van de klantenzorg op te leiden. HEA-specifieke beroepen in de 'energiesector' zijn meer bepaald: contactcentra; energieagentschappen; individuele professionals (ingenieurs/andere technische beroepen in de energiesector).

5. **De sociale sector**, met betrekking tot zeer gediversifieerde contexten en organisaties zoals: de tertiaire sector, sociale departementen en diensten, consumentenverenigingen, sociale organisaties en caritatieve instellingen (Rode Kruis, Caritas enz.), woningcorporaties. De relevantste HEA-specifieke beroepen in de 'sociale sector' zijn: sociale diensten; consumentenverenigingen; tertiaire sector; sociale huisvesting en gebruikers (waar de HEA als een gelijke onder gelijken werkt).
6. **De instellingen**, met betrekking tot lokale/regionale sociale diensten, gezondheidsdiensten, milieu-educatie, energie-overheden en institutionele energieagentschappen. Twee grote 'institutionele' HEA-contexten blijken vooral relevant: Openbare energieagentschappen, contactcentra, diensten, ... die verband houden met het energiebeleid en energie-incentives; Gemeentelijke technische diensten.

Voor alle beroepen en werkcontexten:

- **problemen** om de doelgroep van kwetsbare afnemers te bereiken. In de 'sociale' werkcontexten kan men hen gemakkelijker bereiken maar is het moeilijker om de juiste technische vaardigheden te ontwikkelen om hen ten volle te informeren en te ondersteunen. Dit maakt de peer-to-peer dimensie zeer uitdagend. De context van de sociale huisvesting is potentieel het meest geschikt;
- **noodzaak** van een duidelijk onderscheid tussen de ondersteuning van energiebesparing tegenover energie-efficiëntie. De HEA kan het bewustzijn, de ontwikkeling van competenties en de betrokkenheid /empowerment van de gebruikers voor een energiezuinig gedrag ondersteunen, maar de ondersteuning van energie-efficiëntie vereist de meer complexe technische vaardigheden van (bestaande) energieadviseurs, samen met meer 'diepgaande' (en duurdere en meer complexe) ingrepen op het gebouw in zijn geheel.

Deze laatste overwegingen bevestigen dat het nuttig is de HEA te zien als een lid van een uitgebreid professioneel team en **de werkcontext van de HEA als 'uitgebreid'** te beschouwen, waarbij de HEA met andere professionals (bv. de gebouwbeheerder, de contactcentra voor energie enz.) samenwerkt of hen ondersteunt.

1.2.2 Activiteiten en competenties van de HEA

De belangrijkste activiteiten van de HEA zijn in drie grote domeinen gegroepeerd:

- analyse van het energiegedrag;
- energiescan en ondersteuning van energiebesparing;
- communicatie met en advies aan afnemers.

De drie activiteitsdomeinen zijn bevestigd door nationaal onderzoek (in de literatuur en op het terrein), dat ook de relevante subactiviteiten en de relevante vaardigheden en competenties heeft gedetailleerd. De onderstaande tabel geeft een volledig overzicht van alle gegevens die het nationale rapport heeft verzameld in termen van de activiteiten (en subactiviteiten) en competenties (kennis, vaardigheden en competenties) van de HEA in de drie belangrijkste actiedomeinen van de HEA.

De competenties van de HEA zijn ingedeeld volgens een modulair systeem, gecorreleerd met de activiteiten, om zowel een gemeenschappelijk schema als de nationale diversiteit te valoriseren. De **indeling en weging van de subactiviteiten** varieert afhankelijk van de verschillende **werkcontexten** (energie versus sociaal versus institutioneel) en van de verschillende **partnerlanden**. De **modulaire benadering** die werd gebruikt om de activiteiten en subactiviteiten van de HEA en de gerelateerde competenties te identificeren en te beschrijven, vormt het conceptuele en operationele frame voor de definitie van de opleiding, de netwerking en de actieprocessen op het terrein van de HEA.

	Activiteiten	Kennis, vaardigheden en competenties
Analyse van het energiegedrag	De eventuele kwetsbaarheid en haar belangrijkste drijfkrachten/dimensies identificeren De informatie aan het doelpubliek aanpassen Informatie verzamelen (vragenlijsten, interviews, observatie, gegevensonderzoek...) De punten van energieverbruik in het huishouden/de gezinsunit identificeren De elektrische huishoudtoestellen analyseren Toeleveringscontracten verzamelen - de brandstofkosten van het huishouden interpreteren De verbruiksgeschiedenis en de gewone/buitengewone onderhoudsinterventies analyseren De gewoonten en de bijzondere behoeften analyseren (bv. biotechnologie)	Technische kennis van de sector, in het bijzonder met betrekking tot: energiesysteem en markt retailsysteem huishoudelijk energieverbruik energiefacturen en tariefstructuren op de markt beschikbare diensten oplossingen voor hernieuwbare energie, kosten en subsidiëring (basisbegrippen) Technische kennis van het sociale systeem, in het bijzonder met betrekking tot: structuur en diensten van het systeem dimensies en kenmerken van de kwetsbaarheid brandstofarmoede (oorzaken/gevolgen en beleidslijnen/acties) Vermogen om de werkcontext te analyseren Vermogen om te observeren, te meten, te analyseren en te synthetiseren Vermogen om zich aan situaties aan te passen Communicatie- en relatievaardigheden en -competenties
Energiescan en ondersteuning van het	Het energiegebruik en de energie-efficiëntie van een huishouden meten Systemen voor efficiëntie/correct gebruik identificeren Een 'vereenvoudigde energiescan' uitvoeren	Vermogen om de relevante energietoepassingen te classificeren en aan te stippen Vaardigheden in de analyse van het energieverbruik Vermogen om de vereenvoudigde energiescan uit te voeren

	Interessante contacten en een bronnenlijst leveren Een pakket/tools voor energiebesparing toepassen om het energieverbruik te monitoren/optimaliseren Energiefacturen en betaalopties analyseren Ondersteuning van energiebesparend gedrag, zoals: 'gedragstips' voor het verlagen van het energieverbruik Tarieven vergelijken, van tarief veranderen en/of over energiecontracten adviseren Economische incentivemechanismen identificeren + verzoeken indienen	Vermogen om energiebesparingen en efficiëntieverbeteringen te berekenen Competenties in verband met een 'functionele analyse' met het oog op de consumententypologie Competenties in het voorstellen van mogelijkheden om de energie-efficiëntie te verbeteren Kennis en vaardigheden in verband met de identificatie van en de toegang tot subsidiëringsmogelijkheden (incentives, premies...)
Communicatie met en advies aan afnemers	Advies over algemene energie-informatie en over specifieke vragen Advies over het correcte gebruik van systemen Informatie over manieren om gas en elektriciteit te betalen Tips en gedrag voor energiebesparing communiceren Gepersonaliseerde rapporten en/of 'Richtlijnen voor energie in het gezin' voorbereiden Rechtstreekse interactie bevorderen De vorming van aankoopgroepen steunen Bijeenkomsten/workshops organiseren Gidsen/brochures produceren Informatiemateriaal, presentaties en andere communicatietools voorbereiden Een effectieve interactie tussen de betrokkenen valoriseren	Communicatievaardigheden en -competenties (mondeling, luisterend en schriftelijk) Communicatie met technisch en niet-technisch personeel Planning en organisatie van evenementen Kennis van aankoopgroepen Empathie Open, toegankelijke persoonlijkheid Sociale intelligentie Communicatievaardigheden en -competenties (ook schriftelijk, via telefoon en ICT). Schrijfvaardigheden (presentaties...) Relatievaardigheden (empathie, effectieve communicatie,...) Competenties in het voorstellen van mogelijkheden om de energie-efficiëntie te verbeteren

2. Opleiding 'Home Energy Advisor' (energieadviseur voor de woning)

Alle voor de HEA relevante werkcontexten en rollen vereisen de definitie, de levering en de doorlopende update van effectieve opleidingsprogramma's. Op basis van de vereisten voor de HEA heeft ASSIST een modulair programma ontwikkeld dat het volgende garandeert:

- een gemeenschappelijk professioneel en opleidingskader voor de EU (ook met betrekking tot de erkenning van de competenties, ecvets, professionele mobiliteit enz.);

- een aanpassing aan de nationale omstandigheden van de HEA: achtergrond/instapniveau (werkzoekende, kwetsbare afnemer, sociaal werker, helpdeskoperator enz.); werkcontexten (sociale diensten, helpdesks, sociale huisvesting enz.).

In elk land zullen **75 HEA's worden opgeleid (behalve in het Verenigd Koninkrijk, waar 6 HEA's zullen worden opgeleid)**. De mix van deelnemers aan de opleiding, de toekomstige HEA's, zal van land tot land verschillen volgens de typologie van de doelpersonen (in termen van instapniveau en potentiële beroepscontext) en de relatieve aantallen.

De nationale richtlijnen voor de opleiding (D3.2) zullen de specifieke mix van doelpersonen en de opleidingsprogramma's beschrijven, met inbegrip van de methodologische keuzes (bv. afstands- versus aanwezigheidsonderwijs) en de operationele keuzes (bv. acties voor de betrokkenheid van de doelpersonen). Hoewel de opleidingsstrategie van land tot land kan variëren, afhankelijk van het type HEA, dient benadrukt dat in elk land ook kwetsbare afnemers aan de HEA-opleiding van ASSIST zullen deelnemen, om methodologieën voor een ondersteunende werking 'tussen gelijken' te activeren. Aangezien de kwetsbare afnemers die de HEA-opleiding zullen volgen werkloze professionals, mensen uit gezinnen in de sociale huisvesting, vrijwilligers enz. kunnen zijn, zullen hun instapniveau en hun opleidingsbehoeften sterk verschillen. Daarom wordt de opleiding van ASSIST voor de kwetsbare afnemers volgens de algemene strategie van het land gedefinieerd, waarbij rekening wordt gehouden met de verschillende 'typologieën' van kwetsbare afnemers in de verschillende landen (en binnen hetzelfde land).

Vertrekkend van de analyse van de rollen, activiteiten van de HEA, verzameld in drie hoofddomeinen (analyse, scan, communicatie), is een modulair systeem van leeruitkomsten en opleidingsmodules gedefinieerd.

Consistent met de drie activiteiten worden drie grote competentiedomeinen van de HEA vereist: **technisch, sociaal, relationeel.** Kennis en vaardigheden zijn vereist met betrekking tot de technische aspecten van energie (met inbegrip van alle voor de adviesrol en de terreinwerking van de HEA vereiste competenties) en met betrekking tot het sociale systeem (met inbegrip van de kwetsbaarheidsproblematiek). De weging van de technische, sociale en relationele dimensies van de opleiding was zeer uitdagend, als gevolg van de verschillende perspectieven van de diverse betrokkenen. Daarnaast moet iedereen worden opgeleid in de gedragsaspecten met betrekking tot energieverbruik, en in sterke relationele competenties. In elke context wordt de noodzaak van een specifieke opleiding als een cruciaal punt benadrukt, vooral met betrekking tot de ontwikkeling van de juiste 'relationele', communicatie- en empathische competenties in de omgang met afnemers en kwetsbare afnemers. **De noodzaak van het beklemtonen van de relationele dimensie** wordt in de

verf gezet, met een verschillende focus, samen met de relevantie van de technische dimensies (in termen van de technische adviesrol en de vereiste technische competenties).

Ook de noodzaak van een evenwicht tussen de drie dimensies van de HEA (technisch-sociaal-relationeel) verdient een bijzondere aandacht in de analyse van de rol van de HEA in **contactcentra** (van energiebedrijven of -agentschappen; van consumentenverenigingen; van openbare instellingen zoals de nationale energieoverheden). In deze gevallen moeten de technische en relationele vaardigheden van de HEA sterk ontwikkeld zijn met het oog op telefonische en schriftelijke communicatie.

Last but not least kan ook **opleiding in de volgende domeinen** cruciaal zijn indien de opgeleide HEA in specifieke sectoren zal werken: veiligheid en gezondheid; beveiliging; gegevensbescherming en -vertrouwelijkheid en gegevenssystemen van het programma; beleidslijnen en procedures van bedrijven.

De keuze van de onderwerpen van de HEA-opleiding van ASSIST en de manier waarop ze worden behandeld, zal worden gedetailleerd in de unieke nationale opleidingsrichtlijnen (in de algemene opleiding van ASSIST zijn voor deze onderwerpen geen uren toegewezen). Tot slot voorziet de HEA-opleiding een gemeenschappelijke **'ASSIST HEA-introductiemodule'** om alle cursisten (ongeacht hun achtergrond en kennis en vaardigheden) te laten kennismaken met:

- Het op de figuur van de HEA gebaseerde ASSIST-model;
- Het opleidingsprogramma en het opleidingsplatform van ASSIST;
- De hulpmiddelen van ASSIST, zoals: projectgegevensblad, communicatie met de consument (op de consument gerichte informatiebronnen over huishoudelijke energie);
- De werking van ASSIST (hulpmiddelen om in het advies aan kwetsbare afnemers te gebruiken) en de HEA-netwerking (hulpmiddelen over de werking en de voordelen van het netwerk).

Er is een modulair systeem van leeruitkomsten en opleidingsmodules gedefinieerd. De volgende tabel geeft de algemene structuur van de HEA-opleidingscursus van ASSIST, die aan elke nationale context zal worden aangepast en zal worden gedetailleerd in de richtlijnen voor de nationale opleidingsstrategie (D3.2) volgens: de specifieke werkcontexten van de HEA (sociale diensten versus helpdesks versus sociale huisvesting enz.); het instapprofiel (werkzoekende, kwetsbare afnemer, sociaal werker, helpdeskoperator enz.). Als algemeen kader voor de HEA-opleiding geeft de volgende tabel:

- **De leeruitkomsten** met betrekking tot de vereiste kennis, vaardigheden en competenties;
- **De modules/inhoud** van elk leerresultaat, met telkens een **tijdsbestek voor de duur**. Rekening houdend met de gemiddelde lengte van elke module zal het totale HEA-opleidingsprogramma van ASSIST 36 uur duren (plus de introductiemodule van 4 uur). In elk land zal de lengte van de modules worden gedefinieerd volgens de specifieke kenmerken van het doelpubliek (competenties op het instapniveau) en de contexten (sectoraal en beroeps).

Activiteiten	Kennis, vaardigheden en competenties	Leeruitkomsten/Modules/Inhoud	Uren
ASSIST HEA-introductiemodule	Het op de figuur van de HEA gebaseerde ASSIST-model illustreren; Het opleidingsprogramma en het opleidingsplatform van ASSIST voorstellen; De hulpmiddelen van ASSIST voorstellen		**4 (2-4)**
Analyse van het energiegedrag De eventuele kwetsbaarheid en haar belangrijkste drijfkrachten/dimensies identificeren De informatie aan het doelpubliek aanpassen Informatie verzamelen (vragenlijsten, interviews, observatie, gegevensonderzoek...) De punten van energieverbruik in het huishouden/de gezinsunit identificeren De elektrische huishoudtoestellen analyseren Toeleveringscontracten en energietransfers verzamelen & de brandstofkosten van het huishouden interpreteren De verbruiksgeschiedenis en de gewone/buitengewone onderhoudsinterventies analyseren De gewoonten en de bijzondere behoeften analyseren (bv. biotechnologie)	Technische kennis van de energiesector, in het bijzonder met betrekking tot: ▪ energiesysteem en markt ▪ retailsysteem ▪ huishoudelijk energieverbruik ▪ energiefacturen en tariefstructuren ▪ op de markt beschikbare diensten	**Basiskennis van de energiesector** De energiesector (basiskennis van de structuur van de sector; focus op het retailsysteem en de belangrijkste betrokken actoren, met inbegrip van de overheden en de helpdesks voor afnemers; op de markt beschikbare diensten) Wetgeving en reglementeringen (algemeen kader van de relevante bepalingen: wetgeving inzake de energiebevoorrading; regulering van de energietrading en het energiebeleid van de EU en het land; energiefacturen en tariefstructuren) Energieverbruik en energiebesparing (basiskennis van de statistieken en paden van het energieverbruik; inleiding tot energie-indicatoren en energie-efficiëntie-indicatoren) Huishoudelijke energietoepassingen (verlichting, gas...), systemen, huishoudtoestellen en apparaten	**6-12**
	Technische kennis van het sociale systeem, in het bijzonder met betrekking tot: ▪ structuur en diensten van het systeem ▪ dimensies en kenmerken van de kwetsbaarheid ▪ specifieke regulering voor de bescherming van kwetsbare afnemers ▪ brandstofarmoede (oorzaken/gevolgen en beleidslijnen/acties)	**Basiskennis van het sociale systeem en de kwetsbaarheid** Het sociale systeem (basiskennis van: de structuur en de actoren van het sociale systeem; de tertiaire sector en de sociale diensten; algemeen kader van de relevante wetgeving en regulering) 'Consumentensysteem' (verenigingen, diensten, regulering) Sociale programma's, beleidslijnen en maatregelen (basiskennis van de bestaande programma's, beleidslijnen en interventies, belangrijkste actoren en procedures voor de toegang tot diensten (met	**6-12**

			inbegrip van een eerste overzicht van de incentives, subsidies en ondersteunende diensten voor het doelpubliek van het sociale systeem) Kwetsbaarheid en energiearmoede (belangrijkste kader voor de kwetsbaarheid en haar kenmerken op EU- en landniveau, met een focus op energiearmoede en met inbegrip van de belangrijkste statistieken over het fenomeen, de streefdoelen, de relevante dimensies van de kwetsbaarheid; de gezondheids- en sociale gevolgen van de kwetsbaarheid) Bestaande nationale/lokale maatregelen, protocollen enz. voor de bescherming van kwetsbare afnemers (specifieke reglementen)	
Energiescan en ondersteuning van het energieverbruik		Vermogen om de werkcontext te analyseren Vermogen om te observeren, te meten, te analyseren en te synthetiseren Vermogen om zich aan situaties aan te passen Communicatie- / relatievaardigheden en -competenties	**Transversaal** (cognitief en met betrekking tot het gedrag) Zie de sectie competenties en leeruitkomsten voor **'Communicatie met en advies aan afnemers'**	
	Het energiegebruik en de energie-efficiëntie van een huishouden meten Systemen voor efficiëntie/correct gebruik identificeren Een 'vereenvoudigde energiescan' uitvoeren Interessante contacten en een bronnenlijst leveren Een pakket/tools voor energiebesparing toepassen om het energieverbruik te monitoren/optimaliseren Energiefacturen en betaalopties analyseren	Vermogen om de relevante energietoepassingen te classificeren en aan te stippen Vermogen om de vereenvoudigde energiescan uit te voeren, wat ook vaardigheden in de analyse van het energieverbruik vereist Vermogen om energiebesparingen en efficiëntieverbeteringen te berekenen Competenties in verband met een 'functionele analyse' met het oog op de consumententypologie Competenties in het voorstellen van mogelijkheden om de energie-efficiëntie te verbeteren Kennis van aankoopgroepen Kennis en vaardigheden in verband met de identificatie van en de toegang tot	**Communicatie- en actiemiddelen vernieuwen** **Scan van het energiegedrag** Gewoonten in het energieverbruik Huishoudelijk energieverbruik Inleiding tot de scan van het huishoudelijke energieverbruik Een vereenvoudigde energiescan ontwikkelen Eerstelijns monitoringactiviteiten en -tools **Ondersteuning van het energiegedrag** Energiegedrag en tips Contracten - Energiefacturen analyseren 'Energiesubsidiëring' ondersteunen Incentives, premies en toegangsprocedures Databank met beste praktijken en incentives	**14-30**

	Tarieven en overstapmechanismen en tarieven vergelijken en/of over energiecontracten adviseren Economische ondersteunings-/incentivemechanismen identificeren + financieringsverzoeken indienen	subsidiëringsmogelijkheden (incentives, premies...); **Kennis en competenties in verband met een of meer specifieke acties**	**Aanvullende gespecialiseerde inhoud** Kosteloze interventies Aankoopgroepen Hernieuwbare energie voor kwetsbare afnemers **Opleidingen/actieprotocollen voor een of meer specifieke acties**	
		Relatievaardigheden en empathische competenties	**Transversaal** (cognitief en met betrekking tot het gedrag) Zie de sectie competenties en leeruitkomsten voor **'Communicatie met en advies aan afnemers'**	
Communicatie met en advies aan afnemers	Advies over algemene energie-informatie en over specifieke vragen Advies over het correcte gebruik van systemen Informatie over manieren om gas en elektriciteit te betalen Ondersteuning van energiebesparend gedrag, zoals 'gedragstips' om minder energie te verbruiken; gepersonaliseerde rapporten; 'Richtlijnen voor energie in het gezin'	(Mondelinge, luisterende en schriftelijke) communicatievaardigheden en -competenties Communicatie met technisch en niet-technisch personeel Vaardigheden in de planning en organisatie van evenementen Empathie Open, toegankelijke persoonlijkheid Sociale intelligentie Relatievaardigheden (empathie, effectieve communicatie ...) Competenties in het voorstellen van mogelijkheden om de energie-efficiëntie te verbeteren	Communicatie- en relatievaardigheden Communicatievaardigheden en -competenties (ook schriftelijk, via telefoon en ICT). Relatievaardigheden (van zelfkennis en zelfbeheersing tot probleemoplossing en non-verbale communicatie) Sociale intelligentie en empathische competenties Vaardigheden in mondelinge en schriftelijke communicatie en 'afstandscommunicatie' Bijeenkomsten en evenementen promoten en organiseren	**10-20**

	Rechtstreekse interactie bevorderen De vorming van aankoopgroepen steunen Bijeenkomsten/workshops organiseren Gidsen/brochures produceren Informatiemateriaal, presentaties en andere communicatietools voorbereiden Een effectieve interactie tussen de betrokkenen valoriseren	KSC-vereisten die volgen uit aan de twee vorige activiteitsdomeinen gerelateerde activiteiten: Vermogen om de werkcontext te analyseren Vermogen om te observeren, te meten, te analyseren en te synthetiseren Vermogen om zich aan situaties aan te passen Communicatievaardigheden en -competenties (ook schriftelijk, via telefoon en ICT) Relatievaardigheden en empathische competenties		

Annex 7 – Energineuvojien pätevöittämisohjelma (FIN)

1. Energianeuvojien profiili

1.1 Alustava ammatillinen profiili

ASSISTin tarkoitus on innovatiivinen ammatillinen profiilin kehittäminen, jotta energianeuvojat voi toimia **energia-, sosiaali- ja institutionaalisten organisaatioiden** sekä yksityisten energiamarkkinoiden toimijoiden, kuten energiayhtiöiden, kanssa.

HEA:ssa on kolme pääroolia ja toimintaa:

- energiankulutuksen käyttäytymisen analyysi;
- energiakäyttäytymisen tukeminen ja tarkastus;
- neuvominen ja viestintä kuluttajille.

1.2 Energianeuvojien pätevöittäminen

HEA-tutkinto-ohjelma kuvaa työn ja osaamisen ominaisuuksia:

- Profiili:
  - HEA-roolit ja työyhteydet;
  - HEA:n toiminta ja alatoiminta;
  - HEA- osaaminen, taidot ja kompetenssit;
- Koulutusohjelma: oppimistulokset ja moduulit, jotka on määritelty erilaisten Energianeuvojien toimenkuvissa ja -rooleissa toteutettavien toimien edellyttämien taitojen mukaisesti.

On tärkeä korostaa, että tässä kuvattu pätevyyskaavio kuvaa yleisiä puitteita, joita kumppanit sovittavat ja muokkaavat kansalliseen kontekstin ja ASSIST-strategian mukaisesti.

1.2.1 Energianeuvojien pätevyys

Energianeuvojien pätevyyskaavio kuvaa Energianeuvojien toimenkuvaa, sellaisena kuin se määritellään eurooppalaisessa ESCO-kehyksessä: " toimenkuvaa on sellaisten työpaikkojen ryhmittely, jotka edellyttävät samanlaisia tehtäviä ja jotka edellyttävät samanlaisia "taitojoukkoja". Ammattilaisia ei pidä sekoittaa työpaikkoihin tai työnimikkeisiin. Kun työ on sidottu tiettyyn työyhteyteen ja toteutetaan yhdellä henkilöllä, ammatti ryhmittelee työpaikat yhteisin piirtein."

"integroivissa" potentiaalisissa ammateissa erilaisissa työympäristöissä. Hankkeen (energian, yhteiskunnan, institutionaalisuuden) tunnistamat kolme keskeistä asiayhteyttä ovat vahvistaneet mukana olevat toimijat, jotka ovat tarkentaneet niitä seuraavasti:

1. **Energia-alalla** on olemassa edustavat järjestöt, viranomaiset, energiajärjestöt, energiapalveluyritykset, energia-alan konsultit ja energia-alan yritykset. Itse asiassa "alasektoria" voivat edustaa samoja markkinatoimijoita - yleishyödyllisiä laitoksia, DSO:ita ja energiayhtiöitä yleensä, jotka voisivat olla kiinnostuneita yritysten sosiaalisesta vastuusta ja / tai parantamaan palvelujaan kuluttajille työllistämällä HEA:lla ja / tai kouluttamaan työntekijöitään asiakaspalvelun verkossa. Tarkemmin sanottuna "energia-alan" HEA-erityistilanteet on osoitettu: <u>yhteyskeskukset; energia-alan laitokset; yksittäiset ammattilaiset (insinöörit ja muut energiaan liittyvät tekniset ammatit).</u>
2. **Sosiaalinen ala,** joka liittyy hyvin monimuotoisiin konteksteihin ja organisaatioihin, kuten kolmanteen sektoriin, sosiaalipalveluihin ja palveluihin, kuluttajajärjestöihin, yhteiskunnallisiin järjestöihin ja hyväntekeväisyysjärjestöihin (punainen risti, caritas jne.), asuntoyhteisöihin. Merkittävimmät HEA-erityistilanteet "sosiaalialalla" ovat osoittaneet: <u>sosiaalipalvelut; kuluttajajärjestöt; kolmas sektori; sosiaalinen asuminen ja ausers (jossa HEA on vertaisryhmä).</u>
3. **Toimielimet** viittaavat paikallisiin / alueellisiin sosiaalipalveluihin, terveyspalveluihin, ympäristökasvatukseen sekä energiaviranomaisiin ja energiainstituutioon. Kaksi keskeistä HEA:n "institutionaalista" kontekstia on tullut merkityksellisemmiksi: <u>julkiset energiajärjestöt, yhteyskeskukset, palvelut ..., jotka liittyvät energiapolitiikkaan / kannustimiin; Kunnan tekniset toimistot.</u>

Kaikissa ammateissa ja työympäristöissä:

- **vaikeuksia** haavoittuvassa asemassa olevien kuluttajien tavoitteen saavuttaminen. "Yhteiskunnallisiin" työympäristöihin sopivampi on saavuttaa ne, mutta on vaikeampaa kehittää asianmukaisia teknisiä taitoja, jotta he voivat täysin tiedottaa ja tukea heitä. Tämä puolestaan tekee vertaistason vertailuun erittäin haastavaa. Sosiaalinen asuntoyhteys on mahdollisesti sopivin;

- **tarve** pitää suora ero energian säästämisen ja energiatehokkuuden välillä. HEA voi tukea tietoisuutta, osaamisen kehittämistä ja käyttäjien sitoutumista / vaikutusmahdollisuuksia suhteessa energiansäästötapaan, kun taas energiatehokkuuden tukemiseksi tarvitaan entistä monimutkaisempia teknisiä taitoja, jotka kuuluvat muihin (nykyisiin) energia-alan neuvonantajiin sekä "syvemmälle" (ja enemmän kalliita ja monimutkaisia) toimia koko rakennuksessa.

Nämä viimeiset näkökohdat vahvistavat mahdollisuuden harkita HEA:n työskentelyä ammattimaisissa työryhmissä ja laajentaa HEA:n **työyhteyttä "laajentuneina"**, joissa HEA toimii yhteistyössä tai tukee muita ammattilaisia (ts. Rakennuttaja tai energiayhteystökeskukset ja niin edelleen).

1.2.2 HEA Toiminta ja osaaminen

HEA:n tärkeimmät toiminnot on ryhmitelty kolmeen pääalueeseen:

- energiakäyttäytymisen analyysi;
- energiaa säästävä tarkastus ja tuki;
- viestintä ja neuvota kuluttajille.

Kolme toiminta-aluetta on vahvistettu kaikissa kansallisissa tutkimuksissa (jotka liittyvät sekä työpisteisiin että työelämään), jotka ovat myös yksilöineet asiaankuuluvat ala-alat ja asiaan liittyvät taidot ja osaaminen. Seuraavassa taulukossa on kattava kuva kaikista kansallisen raportin HEA:n toiminnasta (ja alatoiminnoista) ja osaamista (tietämystä, taitoja ja osaamista) käsittelevistä todistuksista kustakin kolmesta tärkeimmästä HEA-toiminta-alueesta.

HEA-osaaminen on jäsentynyt moduulirakenteeseen, joka korreloi toimintojen kanssa, jotta nykyinen valorisoida yhteistä kaavaa ja kansallista monimuotoisuutta. **Alatoiminnan artikulaatio ja paino** vaihtelevat erilaisten **toimintaympäristöjen** (energia vs. yhteiskunnallinen vs. institutionaalinen) ja **kumppanimaiden** mukaan. **Modulaarinen lähestymistapa**, jota käytetään tunnistamaan ja kuvaamaan HEA:n toimintaa ja alatoimintaa sekä siihen liittyviä kompetensseja, edustaa käsitteellistä ja operatiivista kehystä HEA:n koulutuksen, verkostoitumisen ja kentän toimintaprosessien määrittelyssä.

	Toiminta	Tieto, taidot ja osaaminen
Energiakäyttäytymisen analyysi	Tunnistaa mahdollinen haavoittuvuus ja sen tärkeimmät ajurit/ulottuvuudet Mukauta tiedot kohteeseen Kerätä tietoa (kyselylomakkeita, haastatteluja, havaintoja, tietojen tarkastelua, …) Tunnistaa energiankulutuspisteet kotitaloudessa/ perheyksikössä Analysoida taloa ja sähkölaitteita Kerätä toimitussopimuksia – tulkita kotimaisia polttoainekustannuksia Analysoida kulutuskertomusta ja tavallisia/ poikkeuksellisia huoltotoimenpiteitä Analysoida tottumuksia ja erityistarpeita (esim. Biotekniikka)	Alan tekninen tietämys: energiajärjestelmä ja markkinat vähittäismyynty kotitalouksien energiankäyttö energialaskuista ja tariffirakenteista markkinoilla saatavilla olevista palveluista uusiutuvan energian ratkaisuista, kustannuksista ja rahoituksesta (perusteet) Sosiaaliseen järjestelmään liittyvä tekninen tietämys erityisesti: sosiaalisen järjestelmän rakenteesta ja palveluista haavoittuvuusmittauksista ja ominaisuuksista polttoaineenkulutuksesta (syyt/vaikutukset ja politiikat/toimet) Kyky analysoida toimintaympäristöä Kyky tarkkailla, mitata, analysoida ja synteettistä Kyky sopeutua tilanteisiin Viestintä- ja relaatiotaidot ja -osaaminen
Energian tarkistus&tuki	Mittaamaan kotitalouden energiankäyttöä ja energiatehokkuutta Tunnistaa tehokkuus/sopivat käyttöjärjestelmät Toteuttaa “yksinkertaistetun energian tarkastuksen” Tarjota mielenkiintoisia yhteyksiä ja resurssien luetteloa Energiansäästöpaketin/työkalujen käyttöönotto energian seurantaan/optimointiin Analysoida energialaskuja ja maksuvaihtoehtoja	Kyky luokitella ja korostaa energian merkityksellisiä käyttötapoja Energiankulutuksen analysointitaidot Kyky jatkaa yksinkertaistettua energian tarkistusta Kyky laskea energiansäästö ja tehokkuuden parantaminen Kuluttajantyyppiseen “funktionaaliseen analyysiin” liittyvät kompetenssit Kompetenssit liittyvät energiatehokkuuden parantamismahdollisuuksien muotoiluun Rahoitusmahdollisuuksien tunnistamiseen ja saatavuuteen liittyvät tiedot ja taidot (kannustimet, bonukset,…)

	Energiansäästötapahtumat tukevat esim.: “käyttäytymisvinkkejä” siitä, miten energiankulutusta alennetaan Verrata ja vaihtaa hintoja ja/tai antaa neuvoja energia sopimuksista Tunnistaa taloudelliset kannustinmekanismit + hakupyynnöt	
Viestintä ja neuvonta kuluttajille	Neuvontaa yleisestä energia-informaatiosta ja erityisistä kysymyksistä Neuvoa järjestelmien asianmukaisesta käytöstä Ilmoittaa keinosta maksaa kaasua ja sähköä Ilmoittaa energiansäästövihjeitä ja käyttäytymismalleja Valmistaa henkilökohtaisia raportteja ja/tai “Perhe-energiasuunnitelma” Edistää vertaistason vuorovaikutusta Tukea ostoryhmien luomista Järjestää kokouksia/työpajoja Tuottaa oppaita/esitteitä Valmistaa informatiivisia materiaaleja, esityksiä tai muita viestintävälineitä Sidosryhmien tehokas vuorovaikutus	Viestintätaidot ja -osaaminen (suulinen, kuuntelu ja kirjallinen) Viestintä teknisen ja ei-teknisen henkilöstön kanssa Tapahtuman suunnittelu ja organisaatio Tieto ostorymistä Empatia Helposti lähestyttävä persoonallisuus Sosiaalinen älykkyys Viestintätaidot ja -osaaminen (myös kirjoitettu, puhelin, tieto- ja viestintätekniikka). Kirjoitustaidot (esitykset, …) Suhteellisuus (empatia, tehokas viestintä,... Osaamiseen liittyvä Competences related to the proposition of opportunities to improve energy efficiency

2. “Home Energy Advisor” Koulutus

Kaikki HEA:n asiaankuuluvat työyhteydet ja roolit edellyttävät tehokkaiden koulutusohjelmien määrittelyä, toimittamista ja jatkuvan päivittämisen tarvetta. HEA:n vaatimuksista lähtien on rakennettu modulaarinen ASSIST-ohjelma, joka takaa:

- Sen yhteinen EU-pohjainen ammatillinen koulutus ja koulutuskehys (myös kompetenssitunnusta, etenemistä, ammatillista liikkuvuutta jne.);
- kansallisen räätälöinnin HEA:n mukaan: tausta/sisääntulotaso (työttömät, haavoittuvassa asemassa oleva kuluttaja, sosiaalinen toimija, avustajaoperaattori jne.); (sosiaaliset palvelut, apupuhelut, sosiaalinen asuminen jne.).

Suomessa lisäkoulutusta annetaan vähintään 75 henkilölle, jotka tulevat jatkossa osallistumaan energianeuvojaverkostoon. Koulutettavat tulevat olemaan taustaltaan ja pohjatiedoilaan vaihtelevia: osallistujia on sekä energia- että sosiaalialalta.

HEA:n roolien analyysistä lähtien toiminta ja osaaminen ryhmitellään kolmeen pääalueeseen (analyysi, tarkastus, viestintä), määritellään modulaarinen oppimistulosten järjestelmä ja koulutusmoduulit.

Kolmesta toiminnasta riippuen HEA: lle tarvitaan kolme keskeistä osaamista: **tekninen, sosiaalinen, yhteiskunnallinen.** Tietämystä ja taitoja tarvitaan energia-alan "teknisyyteen" (mukaan luettuna kaikki HEA: n neuvonantajasta ja kenttätyöstä vaadittavat taidot) sosiaalisen järjestelmän (mukaan lukien haavoittuvuusongelmat). Kurssin teknisten, sosiaalisten ja suhteellisten ulottuvuuksien painot ovat olleet erittäin haastavia eri sidosryhmien eri näkökulmien vuoksi. Lisäksi tarvitaan koulutustarpeita käyttäytymiseen liittyvistä näkökohdista energiankulutukseen ja vahvaan suhteelliseen osaamiseen. Kaikissa yhteyksissä on korostettava erityiskoulutuksen tarvetta ratkaisevana tekijänä, erityisesti kun on kyse asianmukaisten "relaatiotietojen" kehittämisestä, viestinnästä, painottavasta osaamisesta kuluttajien ja haavoittuvassa asemassa olevien kuluttajien kanssa. On korostettu **tarvetta korostaa relaatiotietoa**, jossa keskitytään erityisesti teknisten ulottuvuuksien merkitykseen (sekä teknisen neuvonnan että vaaditun teknisen osaamisen kannalta).

Erityistä huomiota on kiinnitettävä siihen, että HEA:n (teknisen ja sosiaalisen ja relaatiotieteellisen) ulottuvuuden tasapainottaminen on otettava huomioon analysoitaessa HEA:n asemaa **yhteyskeskuksissa** (energiayhtiöt tai -järjestöt, kuluttajajärjestöt, julkiset laitokset, me kansalliset energiaviranomaiset). Näissä tapauksissa HEA: n tekniset ja suhteelliset taidot on kehitettävä hyvin puhelimen ja kirjallisen viestinnän toteuttamiseksi.

Viimeisenä, mutta ei vähäisimpänä, **koulutus seuraavilla aloilla** voi olla ratkaisevaa myös, jos koulutettu HEA työskentelee tietyillä aloilla: terveydenhuolto; turvaaminen; tietosuoja ja luottamuksellisuus sekä ohjelmaan liittyvät tietojärjestelmät; yrityksen politiikkaa ja menettelyä.

Valinta sisällyttää ja miten nämä aiheet ASSIST HEA -kurssilla on esitetty yksityiskohtaisissa kansallisissa koulutusohjeissa (yleisten ASSIST-kurssilla ei ole osoitettu

näitä aiheita). Lopuksi HEA-koulutusohjelmaan sisältyy yhteinen "**ASSIST Energianeuvojien koulutus-moduuli**", joka esitellään kaikille harjoittelijoille (heidän taustansa ja tietämyksensä ja taitojensa mukaan):

- ASSIST-malli, joka perustuu HEA:n kuvaan;
- ASSIST koulutusohjelma ja koulutusalusta;
- ASSIST tukee resursseja, kuten: Projektitietokanta, kuluttajille suunnattu viestintä (kuluttajille suunnattuja kotimaisia energiaan liittyviä informatiivisia resursseja);
- ASSIST-toimenpide (resursseja, joita käytetään haavoittuvassa asemassa olevien kuluttajien neuvontaan) ja HEA Networking (resurssit verkon toiminnasta ja sen eduista).

Modulaarinen oppimistulosten ja koulutusmoduulien järjestelmä on määritelty, ja seuraava taulukko edustaa ASSIST HEA -kurssin yleistä rakennetta, joka mukautetaan jokaiseen kansalliseen kontekstiin ja määritellään kansallisessa koulutusstrategiassa (D3.2). HEA:n työyhteydet (sosiaalipalvelut vs. apupuhelut vs. sosiaalinen asuminen jne.); (työttömät, heikossa asemassa oleva kuluttaja, sosiaalinen toimija, avustajaoperaattori jne.). Yleisenä HEA-koulutuskehyksenä seuraava taulukko kertoo:

- **Oppimisen tulos** osaamistavoitteet, taidot ja osaamisvaatimukset;
- Kunkin oppimistuloksen **moduulit/sisältö** ja kunkin **aikataulun kesto**. Kun otetaan huomioon kussakin moduulissa keston kesto, koko ASSIST HEA -opetusohjelma kestää 36 tuntia (plus 4 tuntia esitelmämoduulista). Kussakin maassa tavoite (kompetenssit tulotason) ja kontekstien (sektori- ja työolot) erityispiirteiden mukaan määritellään moduulin pituus.

Toiminta		Tieto, taidot ja osaaminen	Osaamistavoitteet/ Moduulit/Sisältö	Tunnit
ASSIST HEA Introductive Module		Kuvata HEA:n kuvion perusteella ASSIST-malli; Esittelemään ASSIST-koulutusohjelmaa ja koulutusalustaa; Esittää ASSIST-tuen resursseja		**4 (2-4)**
Energiakäyttäytymisen analyysi	Tunnistaa mahdollinen haavoittuvuus ja sen tärkeimmät ohjaimet / ulottuvuudet Muokata tietoja kohteeseen Tietojen kerääminen (kyselylomakkeet, haastattelut, havainnointi, tietojen tarkastelu ...) Tunnistaa energiankulutuspisteet kotitaloudessa/ perheyksikössä Analysoida taloa ja sähkölaitteita Kerätä toimitussopimuksia ja energiansiirtoa ja tulkitsemaan kotimaisia polttoainekustannuksia Kuluttajien historian ja tavallisten/ poikkeuksellisten huoltotoimien analysointi Analysoida tottumukset ja erityistarpeet (esim. Bioteknologia)	Energia-alan tekninen tietämys, jossa kiinnitetään erityistä huomiota: ▪ energiajärjestelmä ja markkinat ▪ vähittäiskaupan järjestelmä ▪ kotitalouksien energiankäyttö ▪ energialaskuja ja tariffirakenteita ▪ markkinoilla saatavilla olevat palvelut	**Basic Energia-alan perustiedot** Energia-ala (ala-alan perustiedot, vähittäiskauppajärjestelmä ja tärkeimmät toimijat, mukaan lukien viranomaiset ja kuluttajat, auttavat toimistoja, markkinoiden saatavilla olevia palveluja) Lainsäädäntö ja määräykset (asiaa koskevat yleiset puitteet: energian toimittamista koskeva lainsäädäntö, energia-alan sääntely ja energiapolitiikka, mukaan lukien EU: n ja kansalliset politiikat, energialasku ja tariffirakenteet) Energiankulutus ja energiansäästö (perustiedot energiankulutustilastoista ja -poluista, energiaindikaattoreiden käyttöönotto ja energiatehokkuusindikaattorit) Kotitalouksien energiankäyttö (Valaistus, kaasu ...) järjestelmät, kodinkoneet ja laitteet	**6-12**
		Sosiaaliseen järjestelmään liittyvä tekninen tietämys, jossa kiinnitetään erityistä huomiota: ▪ sosiaalinen järjestelmärakenne ja palvelut ▪ aavoittuvuusmittaukset ja -ominaisuudet ▪ erityinen sääntely heikossa asemassa olevien kuluttajien suojelemiseksi ▪ polttoaineen köyhyys (syyt / vaikutukset ja politiikat / toimet)	**Perustiedot sosiaalisesta järjestelmästä ja haavoittuvuudesta** Sosiaalinen järjestelmä (perustiedot: sosiaalisen järjestelmän rakenne ja toimijat, kolmas sektori ja sosiaalipalvelut, asiaa koskevan lainsäädännön ja sääntelyn yleiset puitteet) "Kuluttajat" -järjestelmä (yhdistys, palvelut, sääntely) Sosiaaliset ohjelmat, politiikat ja toimet (perustiedot olemassa olevista ohjelmista, politiikoista ja toimista, tärkeimmistä toimijoista ja menettelyistä, jotka liittyvät palvelujen saatavuuteen (mukaan lukien	**6-12**

			ensimmäinen katsaus kannustimiin, rahoitukseen ja tukipalveluihin sosiaalisen järjestelmän tavoitteissa) Haavoittuvuus ja energian köyhyys (keskeinen haavoittuvuus ja sen ominaispiirteet sekä EU: n että kansallisella tasolla, jossa keskitytään energiaköyhyyteen, mukaan lukien ilmiön päätilastot, mukaan lukien tavoitteet, haavoittuvuuden kannalta tärkeät ulottuvuudet, haavoittuvuuden terveys ja sosiaaliset tulokset) Kansalliset/paikalliset olemassa olevat toimenpiteet, pöytäkirjat, ... heikossa asemassa olevien kuluttajien suojelemiseksi (erityisasetukset)	
Energian tekniikka ja tuki		Kyky analysoida toimintaympäristöä Kyky tarkkailla, mitata, analysoida ja synteettistä Kyky sopeutua tilanteisiin Viestintä/suhteelliset taidot ja osaaminen	**Poikittaiset** (kognitiiviset ja käyttäytymiset) Katso **"Viestintä ja neuvonta kuluttajille"** -osaamista ja oppimistulosten aluetta	
	Kotitalouden energiankäytön ja energiatehokkuuden mittaaminen Tehokkuuden / asianmukaisten käyttöjärjestelmien tunnistaminen Toteutetaan "yksinkertaistettu energian tarkistus" Tarjoaa mielenkiintoisia yhteyksiä ja resurssien luetteloa Energiansäästöpaketin / työkalujen käyttöönotto energian seurantaan / optimointiin Analysoidaan energialaskuja ja maksuvaihtoehtoja Verrata hintoja ja vaihtamismekanismeja ja tariffeja ja / tai antaa neuvoja energia-alan sopimuksista	Kyky luokitella ja korostaa energian merkityksellisiä käyttötapoja Kyky jatkaa yksinkertaistettua energiankulutusta, joka puolestaan vaatii energiankulutuksen analysointitaitoja Kyky laskea energiansäästö ja tehokkuuden parantaminen Kuluttajatyyppiseen "funktionaaliseen analyysiin" liittyvät kompetenssit Komponentit liittyvät energiatehokkuuden parantamismahdollisuuksien muotoiluun Tieto ostoryhmistä Rahoitusmahdollisuuksien tunnistamiseen ja saatavuuteen liittyvät tiedot ja taidot (kannustimet, bonukset jne.); **Erityistoimet (-alueet) liittyvä osaaminen ja osaaminen**	**Virkistävä viestintä- ja toimintaresurssit** **Energiakäyttäytymisen tarkistus** Energiankulutustottumukset Kotimainen energiankulutus IJohdatus kotimaiseen energiankulutukseen Miten kehitetään yksinkertaistettu tarkastus Ensimmäisen tason valvontatoimet ja -välineet **Energiakäyttäytymisen tuki** Energiakäyttäytyminen ja vinkit Sopimukset - Energialaskujen analyysi Tuetaan energiaa "Rahoitus" Kannustimet, bonukset ja pääsymenettelyt Best Practices and Incentives -tietokanta **Muita erikoistuneita sisältöjä** Nollahintaiset toimenpiteet	**14-30**

	Tunnistetaan taloudellinen tuki / kannustinmekanismit + rahoituspyynnöt		Hankeryhmät Uusiutuvat energialähteet heikossa asemassa oleville kuluttajille **Erityistoimiin liittyvä koulutus / toimintasuunnitelmat (-optiot)**	
		Suhteellisuus ja painottuvat taidot	**Poikittaiset** (kognitiiviset ja käyttäytymiset) Katso **"Viestintä ja neuvonta kuluttajille" -osaamista ja oppimistulosten aluetta**	
Viestintä ja neuvonta kuluttajille	Opastaa yleisestä energia-informaatiosta ja erityisistä kysymyksistä Antaa neuvoja järjestelmien asianmukaisesta käytöstä Tiedottaa keinoista maksaa kaasua ja sähköä Energiansäästötapahtumat tukevat meitä "käyttäytymisvinkkejä" siitä, miten energiankulutusta alennetaan; henkilökohtaiset raportit; "Perheenergian suuntaviivat" Edistää vertaisryhmien välistä vuorovaikutusta Tukemaan ostoryhmien luomista Järjestää kokouksia/ yöpajoja Valmistaa oppaita/esitteitä Valmistaa informatiivisia materiaaleja, esityksiä tai muita viestintävälineitä Valjastaa tehokkaan vuorovaikutuksen sidosryhmien kesken	(Suullinen, kuuntelu ja kirjallinen) Viestintätaidot ja -osaaminen Viestintä teknisen ja ei-teknisen henkilöstön kanssa Tapahtumasuunnittelu ja organisaatiotaidot Empatia Helposti lähestyttävä persoonallisuus Sosiaalinen älykkyys Suhteellisuus (empatia, tehokas viestintä, ...) Energiatehokkuuden parantamismahdollisuuksia koskevaan ehdotukseen liittyvät taidot KSC: n vaatimukset edellisistä kahdesta toiminta-alasta: Kyky analysoida toimintaympäristöä Kyky tarkkailla, mitata, analysoida ja synteettistä Kyky sopeutua tilanteisiin Viestintätaidot ja -osaaminen (myös kirjoitettu, puhelin, tieto- ja viestintätekniikka) Suhteellisuus ja painottuvat taidot	Viestintä- ja relaatiotekniset taidot Viestintätaidot ja -osaaminen (myös kirjoitettu, puhelin, tieto- ja viestintätekniikka). Suhteellinen osaaminen (itsetuntemuksesta ja johtamisesta ongelmanratkaisuun eikä suulliseen viestintään) Sosiaalinen älykkyys ja voimakas osaaminen Suullinen, kirjallinen ja "etäinen" viestintätaito Kokouksien ja tapahtumien edistäminen ja järjestäminen	**10-20**

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