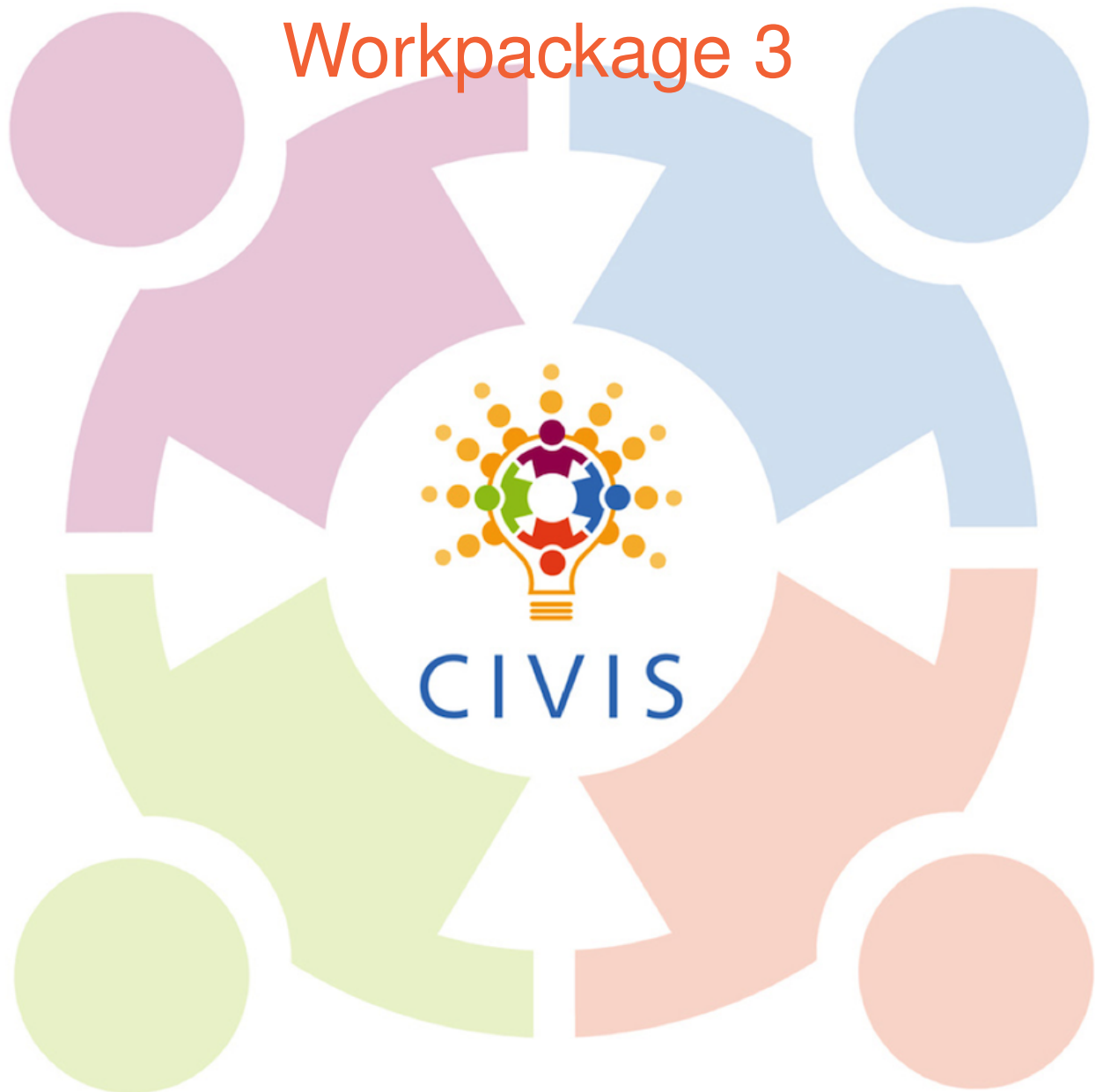


# D3.3 Final Field Tested Integrated Energy System Workpackage 3



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## Executive Summary

This report summarizes the 3rd year's activities of CIVIS WP3 and the results and contributions of the WP. The research attention of CIVIS is oriented towards the potentials and challenges of users' collective action, social values and sense of communities in smart grids. To this end, the main activities in the 3rd year of WP3 continued the iterative, theory-driven, and user-centered development process in the 3rd year. WP3 completed the design and development of the CIVIS *YouPower* platform, expanding upon the 2nd year's results.

The design and development of YouPower can be divided into three self-contained, interrelated and composable parts: (1) Action Suggestions (contextualized and deployed to both test sites); (2) Housing Cooperatives (contextualized and deployed to the Swedish test site); and (3) Energy Awareness at Individual and Collective Levels (contextualized and deployed to the Italian test site). The intension of the application is to increase energy awareness, to inform users' energy consumption know-how, to promote environmental social norms, and to facilitate users for energy conservation and load-shifting behavior changes that are implementable in everyday life. We derived ten design guidelines to address a number of design issues based on (pro-environmental interventions, social and environmental psychology) literature and our design experience. These guidelines are discussed in depth in this report and they can be useful for a wide group of environmental intervention designers:

1. Develop and enhance consumers' energy conservation know-how through action suggestions that are implementable in everyday life.
2. Explicitly express action suggestions with concrete and reliable content.
3. Provide suggestions ranging from one-time actions to routine actions.
4. Support demand side management (load-shifting) through simple time-of-use (ToU) signals.
5. Indicate the effort entailed by a suggested action and its potential impact in an understandable way.
6. Enhance and maintain intrinsic motivation; promote more active and volitional forms of extrinsic motivation.
7. Use social norms and public commitment to address low motivation.
8. Facilitate consumers to reflect on (environmental) lifestyle choices in the process of behavior change.
9. Engage all household members.





## 10. Define energy interventions through co-design approaches.

The key features designed for the YouPower platform include:

1. Action suggestions, where users are provided with suggestions of actions that are implementable in everyday household practices. It presents users with motivators for behavior change (and its process), and means for self-monitoring, self-reflection and social sharing of the pro-environmental behavior change process at individual, household and community levels. Each action is accompanied with the information about the potential effort and impact, user comments and a list of participants who are taking this action. A user can decide whether to take an action and to schedule it. A user also see actions of household members.
2. Housing cooperatives, where energy management and cooperative energy reduction actions are linked to each cooperative's energy performance. The building level energy information and the energy related actions of each housing cooperative are presented to users. This allows comparison between housing cooperatives based on the energy performance and actions, and supports knowledge exchange and social sharing and learning among cooperatives in energy reduction actions.
3. Energy awareness at individual and collective levels, where users are presented with real time and historical energy consumption and production information. It provides users with time-of-use signals based on real time and forecasted information about local production from renewable sources and the corresponding energy demand in order to enable load-shifting actions in everyday practice. It also presents users with reference information about energy performance in relation to the neighborhoods.

The CIVIS YouPower platform is currently deployed and tested at the Stockholm (Sweden) and Trento (Italy) test sites corresponding to the local context. To reach a wide group of research communities and general public, the YouPower software is open source with an online repository and API documentation. The package management and application setup of YouPower are also discussed in this report to support potential usership and future development of the application.



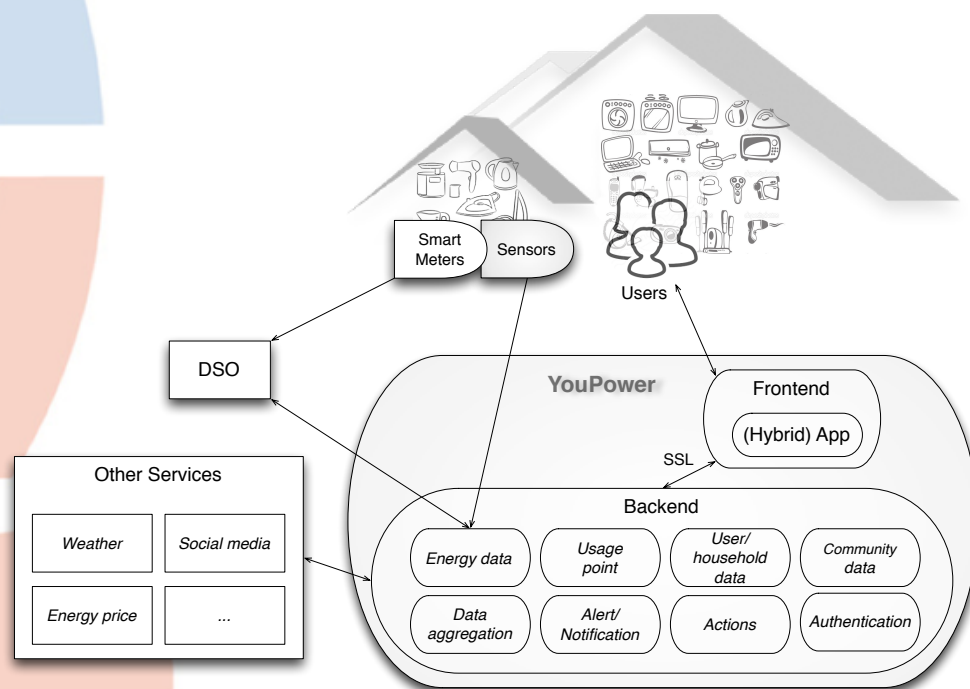
# 1 Introduction

## 1.1 Aim and Scope

Work Package 3 (WP3) focuses on the design and development of ICT facilitation for social participation in the energy network to manage communities and support energy services. Deliverable 3.3 (D3.3) is described in the CIVIS DoW as follows:

D3.3) Final field tested Integrated Energy System: Output of T3.1-5; Based on information provided by the deployment of deliverable 3.2 the software is further refined to provide energy services and community management (open source).

The 3rd year's project activities continued and completed the design and development of the CIVIS software platform *YouPower*<sup>1</sup>, expanding upon the 2nd year's result reported in D3.2 (?). As stated in D3.2, the CIVIS platform is composed of two parts (see Figure 1): the



DSO (Distribution System Operators), SSL (Secure Sockets Layer)

Figure 1: CIVIS platform overview

services provided by the CIVIS back-end, and the CIVIS front-end application that users

<sup>1</sup><http://civis.tbm.tudelft.nl/> or <https://app.civisproject.eu/>



directly interact with. To this end, WP4 focuses on the system level ICT services that deal with the energy data and its collection through the smart meters and sensors installed at the Swedish and Italian test sites (see D4.3 for more details). WP3 focuses on the front-end application and the social level ICT services that are related to users/prosumers, households, communities, energy consumptions, etc.

## 1.2 Overview

In this report, we present and discuss the design and development (Sec. 2 and 3) of the WP3 part of the CIVIS platform known as YouPower<sup>2</sup>. The final results are presented and discussed as a whole for readability and usefulness. We also present the user registration processes (Sec. 4) that are tailored for the Swedish and Italian test sites, and give a detailed description of the management and the setup of the YouPower application (Sec. 5). The contribution of the tasks in WP3 are summarized<sup>3</sup> (Sec. 6).

In the 3rd year of CIVIS, WP3 completed the design and development of YouPower. A large part of Action Suggestion (Sec. 2.3.1) was completed during the 2nd year. About half of the Housing Cooperative part (Sec. 2.3.2) was completed in the 2nd year. The majority of the Energy Awareness part (Sec. 2.3.3) was completed in the 3rd year. All functionalities of the YouPower platform are reported and discussed in this deliverable. YouPower is currently deployed and tested at Stockholm (Sweden) and Trento (Italy) test sites respectively according to the local context. YouPower usage data is being collected — the CIVIS project committed to continuing the YouPower data collection (keep the servers running) for 6 months after the end of the project as discussed during the 2nd year's review meeting in Brussels.

From an end-user's perspective, anyone (also those outside of the test sites) can sign up and use the YouPower application. The Action Suggestion part is ready to be used as-is (see Sec. 2.3.1 for details). The Housing Cooperative part is applicable to those who live in countries with concepts such as housing cooperatives or owner associations, and have the required data of housing cooperatives, cooperative energy consumption and actions (see Sec. 2.3.2 for details). The Energy Awareness part is applicable to those who have energy data at the required levels and/or interested in load-shifting according to local productions (see Sec. 2.3.3 for details).

From a developer and/or intervention designer's perspective, YouPower can be reused, extended and adapted to allow for a multitude of applications and different levels of integrations related to energy conservation/load-shifting interventions. YouPower software is

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<sup>2</sup>The CIVIS front-end application used to be called EnergyUP. The old name may be found in some old documents and/or mock-ups.

<sup>3</sup>As stated in the 2nd year's technical review report: *Task 3.5 is practically abandoned as indirectly mentioned in D3.2 (pp. 38) and verbally confirmed during the review meeting.* T3.5 is therefore not included in Sec. 6.



open source and will remain so under the Apache v.2 License<sup>4</sup>. It has an online repository at GitHub<sup>5</sup>. The backend API documentation is available online<sup>6</sup>. The platform is designed with different composable packages allowing for flexible and extensible integration. The packages are available for any interested party to be reused, modified, and extended under the Apache v.2 License.

As requested during the 2nd year's review meeting, the YouPower website<sup>7</sup> is updated to provide up-to-date information of the platform to attract more users and to increase visibility. Details of the update can be found online. The description of the management and the setup of the YouPower application discussed in Sec. 5 is also available on the project website.

### 1.3 Design and Development: the Continuation

Environmental problems have their origins in human behaviour; as a result, any solution to environmental issues will require changes in behaviour (?). Collective human behavior is deemed critical because it is both a source and a solution to the problem of climate change (?). In this context, the design of YouPower aims to support social participation, awareness and engagement by means of ICT in the smart grids to achieve sustainable energy goals such as consumption reduction and load shifting. Researchers can also use this platform as a communication channel to promote sustainable energy goals, and as a research instrument to observe users' responses and possible outcomes.

The design and development of YouPower is theory-driven, user-centered and iterative (??). We extensively researched literature on intervention strategies and social smart grid applications directed at promoting environmental consumer behavior change. This provided an initial set of design ideas that are iteratively refined and improved through the design process. Applying a user-centered design process can lead to more acceptable, satisfying and effective designs (?). This increases the potential of the intervention (?) and may help increase user engagement with respect to the sense of relatedness to the application (???).

In the 2nd year of CIVIS, we started with brainstorming sessions and a design workshop. A set of features was prototyped in simple handcrafted mock-ups used as a basis for discussion, and then underwent iterative rapid prototyping which produced wireframes as visual guides that can be more effectively communicated to general users. These prototypes were evaluated by user tests with groups of students and colleagues. Using the wireframe prototypes and later the software prototypes, we conducted focus group studies with consumers in Trento, test studies and focus groups with consumers and housing cooperative members

<sup>4</sup><https://github.com/CIVIS-project/YouPower/blob/master/LICENSE>

<sup>5</sup>YouPower: <https://github.com/CIVIS-project/YouPower/>; the CIVIS project: <https://github.com/CIVIS-project/>.

<sup>6</sup><http://civis.tbm.tudelft.nl/apidoc/>

<sup>7</sup><https://app.civisproject.eu/>



in Stockholm, as well as a user study with environmental participants in Helsinki.

In the 3rd year of CIVIS, the iterative design and development process continued. Particular attention was paid to quick responses to changes, user feedback and adaptive development. We also furthered literature research in environmental psychology and intervention design, and expanded the design guidelines based on literature, our design practices and experiences. These guidelines can be useful for a wide group of designers who are interested in environmental information-based intervention. YouPower has been refined and improved gradually in the 3rd year resulting the current version of the application. The first deployment at the Stockholm test site was in Nov 2015 and Trento test site in Mar 2016 correspondingly. The production server (i.e. CIVIS YouPower server hosted by TU Delft) since then has been updated once there were new parts ready for deployment. The rest of this report presents and discusses the latest version of YouPower.

## 2 CIVIS Platform Design

### 2.1 Motivation: Bridging the Attitude-Behavior Gap

Environmentally significant behaviours should be understood as relatively inconspicuous actions performed in the context of everyday life (?). People consume energy through many daily practices and routines in households (????). How and to what extent these daily actions affect domestic energy use and in turn the environment are not always readily apparent to average consumers (??). This knowledge deficit poses significant constraints for consumers to perform and engage in energy conservation (and energy efficiency) behaviors (??). Acquiring such information is often costly (?).

A rich body of empirical research suggests that relevant information tends to result in higher knowledge levels but not necessarily in behavior changes or energy savings (????). Despite growing environmental awareness and articulated preference for “green” lifestyles, people’s environmental values and attitudes often fail to materialize in actual actions and behavior changes, from energy conservation, to recycling, to the purchase of green products (???). This imparity is commonly referred to as the attitude-behavior gap or the value-action gap (???).

Although there is no single framework or theory that provides definitive explanations for the attitude-behavior gap (??), literature provides suggestions that shed some light on this issue. People perform (or do not perform) certain pro-environmental actions for many reasons (?). The reasons for acting are often referred to as motives or motivation (??). A distinction can be made between *primary motives* and *selective motives* (??). Primary motives influence decisions to engage (or not to engage) in a whole class of actions or behaviors. For example, *Do I want to bike to work (in general)?* They can be understood as general attitudes towards certain actions. Selective motives influence decisions on specific actions. For example, *(It is cold and raining.) Do I want to bike to work (now)?* They have direct posi-





tive or negative impact on the actions. In this sense, primary motives, such as altruistic and social values which build up attitudes, have no direct influence on specific actions. They are often covered up by more immediate selective motives, which evolve around personal and everyday needs and context such as comfort, practicality and complexities in everyday life (???)

The countervailing influences of context-specific reasons for or against specific actions (that is, the selective motives aforementioned) are strong antecedents of one's decisions on the actions (?). In particular, a decision is often more strongly influenced by reasons against the action (??). This means, one can decide not to or fail to perform pro-environmental actions (because of context-specific reasons against the actions) even if one holds pro-environmental values and attitudes. For example, load-shifting of electricity use by doing laundry at night is not an option for shared laundry facilities that are only open during daytime (?); a tenant may depend on the landlord for certain energy reduction actions (that involve investments) to be taken (?). In general, one's abilities and willingness to take energy conservation actions are constrained by the context-specific reasons in everyday life. In many cases, people act habitually or routinely rather than making reasoned choices (??). Habits are learned sequences of actions that have become automatic responses to specific cues, and are functional in obtaining certain goals or end-states (?). Those who have tried to change a habit, even in a minor way, would discover how difficult it is even if the new behavior has distinct advantages over the old one (?). When an individual wants to establish a new behavior, the person has to practice it (?). One might be perfectly willing to change certain behavior but still not do so because the person does not persist enough in practicing the new behavior until it has become a habit (?). A sustained behavior change requires learning a new habit (?).

To bridge the attitude-behavior gap, household energy conservation (and load-shifting) behavior interventions can be geared towards the facilitation of the behavior change process in everyday life. The goal of this process is to motivate consumers to learn and practice new energy consumption behaviors until those behaviors become new habits that are embedded in the specific context of their everyday life. In particular, this means that (1) consumers need to be provided with accurate information about actionable suggestions on how to achieve potential energy conservation (and load-shifting), and (2) the intervention design shall also have means to motivate consumers to voluntarily practice and repeat the energy conservation (and load-shifting) actions in the specific context of their everyday life.

## 2.2 Design Guidelines

This subsection outlines and discusses 10 design guidelines derived from literature and our design experience. The first five guidelines (1 – 5) concern providing accurate and accessible information about actionable suggestions in the behavior change process. Guidelines 6 – 9 address the design part about fostering motivations (and engagement) in the behav-



for change process. Guideline 10 is more a methodological guideline than a specific design guideline. It is not beyond state of the art, but nonetheless a very relevant and important one that deserves attention. ? distinguishes three types of knowledge in pro-environmental actions. Procedural knowledge is about the where, when, and how of some task. Impact knowledge is an individual's beliefs about the consequence of some task. Normative knowledge is beliefs about behaviors of others. An information-based intervention design can provide information that aim to increase all the three types of knowledge. Guidelines 1 – 4, 4 – 5, and 7 address the three types of knowledge respectively.

### **1. Develop and enhance consumers' energy conservation know-how through action suggestions that are implementable in everyday life.**

Action suggestions are recommendations and tips for energy conservation actions. Besides the literature support stated in Subsection 2.1, the results of user studies at the Italian and Swedish test sites of the CIVIS project also suggest that receiving implementable suggestions from a reliable source would be useful for the households. Hence, we recommend to provide action suggestions that can be easily incorporated into everyday practices. In particular, this means that (1) if possible, make action suggestions inexpensive micro-actions or divide a complex action into smaller steps; (2) the suggestions shall be tailored to the local everyday context, and (3) the suggestions shall be provided (to consumers) in an easily accessible manner.

### **2. Explicitly express action suggestions with concrete and reliable content.**

The complexity of the information presented, the framing of the message, and the credibility of the source are among the key issues in delivering effective information (?). (?) propose to explicitly mention the intervention strategy and specify its exact content and which behaviors are targeted; the benefit is twofold: the specifications (1) can provide clear information and suggestions to consumers, and (2) can be used by researchers as a decisive factor in evaluating an intervention's (in)effectiveness. The Italian participants in the user group studies raised the concern that they often found themselves plunged in a series of conflicting advice from various sources. Therefore it is important for them to have a reliable source of information and suggestions on energy conservation strategies or actions. Similarly, some energy managers in the Hammarby Sjöstad housing cooperatives had bad experiences of interactions with energy providers offering energy efficiency services and companies selling energy efficient technologies, and they perceived these companies to have vested interests. Some perceived reliable sources reported in literature are e.g. national and international energy authorities, consumer and environmental organisations (?) as well as neighbours and friends, in contrast to salespeople (?).

### **3. Provide suggestions ranging from one-time actions to routine actions.**

One-time actions (or one-shot behaviors) refer to efficiency (increasing) behaviors, many of which entail the purchase of energy-efficient equipments (??) e.g. using a fridge with A+++ energy label, and installation of attic insulation. Routine actions refer to curtailment



behaviors that involve repetitive efforts to use equipments less frequently or intensively (??), e.g. thawing food in the refrigerator, and air-drying clothes. On the one hand, one-time actions often require purchasing, which offsets their advantage of simplicity, whereas most routine actions have no financial cost (??). On the other hand, one-time actions are often more beneficial and cost-effective in the long-term (?), and their energy-saving potential is generally considered to be greater than that of routine actions (??). While many interventions targeted at households aim to change routine practices (?), we recommend to provide suggestions that range from one-time actions to routine actions. There are actions that are in-between one-time and routine, such as occasionally vacuuming behind the fridge and regularly defrosting the freezer.

#### **4. Support demand side management (load-shifting) through simple time-of-use (ToU) signals.**

The overall efficacy of time-of-use tariffs for demand side management is still debated. However, dynamic signals in energy systems with high presence of renewable energy sources (RES), which are characterized by high unpredictability (e.g. wind, solar, hydro with no basins) (?), seem yet worth considering (??).

To a great extent, supporting changes in energy demand – from reduction to shifts – implies supporting people in changing their daily routines, it does not only involve the ‘simple’ alternative use of an appliance. Energy is ‘used for something’ and this ‘something’ is always deeply rooted in people’s habits and contexts (?). Recent literature claimed that interventions aimed at supporting demand side management by focusing on the *appliance* level<sup>8</sup> of intervention, have very limited and only short-term implications. More effective approaches work at the level of *practice*: supporting people in doing things differently (?). Simplicity and clarity of means to support demand side management at the practice level are key factors to help people adapting and adopting alternative routines. In the particular case of ToU based approaches, ? argued for a design of ToU signals that are the easiest to grasp by people.

#### **5. Indicate the effort entailed by a suggested action and its potential impact in an understandable way.**

The potential benefits (or outcomes) of an action, and the practicality and convenience (or inconvenience) of performing the action are important for people’s decisions on adopting and sustaining the action (??). As discussed earlier, we recommend to provide actions suggestions that are practical and inexpensive so that they can be implemented in busy everyday life, and to include actions that range from one-time to routine actions, as the former has long-term benefits and the latter can be performed straightaway for energy conservation without purchasing. Such information (i.e., both the procedural information and impact information) should be presented to consumers in an easily understandable way.

General consumers often have difficulties understanding energy presented in kilowatt

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<sup>8</sup>This refers to automated appliances or semi-automated/remotely controlled appliances.





hours or water in cubic centimetres (?). These technical units of measurement can be used when needed, while people often prefer to have explanatory information e.g. showing energy use as number of laptops and CO<sub>2</sub> exhaust as number of trees (?). Many studies report that energy conservation outcomes expressed in terms of monetary savings result in underestimation of the impact of the efforts to reduce consumption (???). We recommend to express the effort and impact of each action in a simple and understandable way, for example, in a scale of one to five. This also makes the suggested actions easily comparable. Impact of actions that have already been taken can also be shown by comparing energy use before and after the action was taken.

## **6. Enhance and maintain intrinsic motivation; promote more active and volitional forms of extrinsic motivation.**

Intrinsic motivation is defined as the doing of an activity for its inherent satisfactions (rather than for its presumed instrumental value); contrarily, extrinsic motivation is the doing of an activity to attain some separable outcome or consequence (?). In the context of energy conservation, intrinsic motivators of actions are e.g. pro-environmental values, and common well-being; extrinsic motivators of actions are e.g. monetary incentives, tangible rewards, competitions, and social pressure.

A large body of research favors intrinsic motivation over extrinsic motivation for the following two main reasons. First, intrinsic motivation is more likely to result in long-term behaviour change compared to extrinsic motivation (?). That is, extrinsic motivators can motivate energy conservation, particularly for one-time behaviors; however, behaviors that must be repeated (i.e. routine behavior) will likely stop once the external motivator is removed; extrinsic motivators may even inadvertently increase self-centered behaviors over pro-environmental behaviors (?). Second, intrinsic motivation will lead to positive spillover of pro-environmental behaviors while extrinsic motivation will lead to negative spillover; positive or negative spillover refers to the effect that one pro-environmental behavior increases or decreases the likelihood of additional pro-environmental behaviors (???).

In situations where intrinsic motivations are low or absent, ? propose to promote more active and volitional (versus passive and controlling) forms of extrinsic motivation (?). (?) suggest that extrinsic motivation can vary greatly in the degree to which it is autonomous, i.e., one can perform extrinsically motivated actions with resentment, resistance and disinterest or, alternatively, with an attitude of willingness that reflects an inner acceptance of the value or utility of a task.

For a high level of intrinsic motivation to be maintained or enhanced, or for extrinsic motivation to be more active and volitional, people must experience satisfaction of both the needs for (1) feelings of competence, and (2) senses of autonomy; this means that people must not only experience perceived competence (or self-efficacy), they must also experience their behavior to be self-determined (i.e. free choice rather than being controlled) (?). In such cases, an individual has a strong internal locus of control. Feelings of compe-



tence can be enhanced e.g. through positive performance feedback and encouragement of small steps or micro-actions, whereas senses of autonomy can be enhanced e.g. through allowing and facilitating people's own choices of taking up actions. In addition, ? suggest that the satisfaction of the needs for (3) senses of relatedness facilitates active and volitional extrinsic motivation (i.e. belongingness and connectedness to the person, group or culture disseminating a goal); intrinsic motivation possesses this condition by definition. Supports for relatedness and competence foster internalization, and supports for autonomy additionally foster integration of values and behavioral regulations (?). We recommend to incorporate the facilitation of these three elements into the intervention design.

## 7. Use social norms and public commitment to address low motivation.

Normative knowledge (i.e. perceived social norms) is an understanding of the behavior of others (?). Descriptive social norms are beliefs about what other people are doing, often referred to as *norms of is*, whereas injunctive social norms are beliefs about what other people think they should be doing, often referred to as *norms of ought* (?). Research indicates that normative beliefs can predict a variety of behaviors, and normative interventions are effective in promoting pro-environmental behavior change by giving cues as to what is appropriate and desirable (????). They are useful to address low motivation (?).

Nonetheless, there are quite a few instances where normative beliefs would not be predictive, e.g. when one perceives that a behavior is desired but does not perceive that others are doing it and/or thinks the impact or benefits of one's own actions is very low (i.e. a strong external locus of control), or when one's behavior is not directly observable by other community members (??). Many of these situations can be characterized as commons dilemmas (a.k.a. the tragedy of the commons (?)), that is, whether to reduce one's individual rates of consumption, sacrificing their own desires, freedom to consume, and perhaps personal well-being for the future of the group, or to continue using the resources at the same rate for their own gain and with no regard for others, risking the common pool of resources (??). Free riders are concrete examples of the commons problem. In energy consumption, free riders often appear when the energy cost is included in the rent (or utility package) (?) or when a residence has shared metering (?).

Besides using private ownership and policy interventions to regulate this problem, communication can lead individuals to act in the interest of the group — individuals are considerably more likely to reduce their use of the common when they believe that others who share access to the common will also limit their use (??). Public commitment (and disseminating this information) (??) is a promise or agreement made publicly by a person (or an organization, etc.) to perform a certain action or behavior. When one's own behavior and that of others is publicly observable, the behavior is more likely to be affected by changes in normative beliefs, which in turn may contribute to tackling the commons problem (??). Peer-pressure can induce cooperation among self-interested individuals such as free riders (?). The user study in Helsinki (?) suggests that people are willing to share publicly (or with a selected group of people) their energy conservation actions, and do not consider this a



privacy issue. They are also interested in the conservation actions of others such as household members, neighbors, friends and similar consumers (and households). Similarly, the housing cooperatives in the Hammarby Sjöstad pilot site thought it would be valuable to see building level energy reduction actions taken by other cooperatives and, since it is co-operative level information, they were also willing to share energy data for comparison purposes.

## **8. Facilitate consumers to reflect on (pro-environmental) lifestyle choices in the process of behavior change.**

? critically reviewed ICT technologies designed for environmental behavior interventions (and persuasions). The authors point out that existing design, having a narrowed vision of sustainability, overly focuses on modernistic system change and individual consumption and entrusts designers with the responsibility to decide what is or is not appropriate behavior. They suggest to lessen the prescription of pro-environmental or sustainable actions chosen by designers, who may not connect with users' actual everyday life experiences, and instead to make design that help elicit issues of sustainability and encourage users for open-ended reflection on what it actually means to be sustainable in a way and with lifestyle choices that make sense in the context of their everyday life. With this goal, our design (1) lets users to choose and schedule the actions according to their needs and interests, and (2) facilitates commenting and discussions among users.

## **9. Engage all household members.**

It is important to engage all household members in energy conservation in everyday life. The artifacts, technologies and resource systems to date are typically designed for "household resource managers", often men, although they are far from the only energy users in households (?). Women dominate the everyday practices of the household (particularly cleaning activities), and are often more sensitive to understandings of presentability, body odour, hygiene and cosiness (?). Women usually show more concern about environmental destruction, and are more emotionally engaged and willing to change (?). Families with children generally consume more energy than those without and this consumption tends to increase as children grow older (?). Children and teenagers are commonly recognized as lacking interest in energy bills, and they participate in or are the cause of many energy consuming practices (??). Studies show that children enjoy the involvement and responsibility in helping save energy, and parents' commitment also increases when they think about energy conservation in the context of their children's education (??). Discussing and establishing common family responsibilities around energy consumption is reported to be effective (?).

## **10. Define energy interventions through co-design approaches.**

As widely reported in literature<sup>9</sup>, changes of energy attitudes and behaviours are deeply

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<sup>9</sup>For an extensive overview (yet not exhaustive) of how societal aspects intersect behavioural and attitudes change in energy, see (?).



rooted into the broader social environment in which they shall take place. For instance, failures to properly understand the social constraints that are situated in the local contexts, greatly undermine the possibility for any policy, technology or form of intervention to be effective in the energy domain (?). Pre-existing social norms, concrete and tangible local energy needs (which may well vary at municipality, regional or national levels) as well as perceived energy or environmental challenges, they all impact households and people engagement in improving (sustainably) energy behaviours.

For an energy intervention to have chances of becoming locally relevant and sustainable in a given place, it is crucial to engage with all the related stakeholders (*e.g.* Public Administrations, DSOs, retailers, households, associations) and to involve them in the definition and appropriation of energy interventions – with regards to their objectives and, moreover, to the tools and technologies that support them. Codesign approaches are becoming more and more used to uncover the complexities of energy systems in their local contexts (*e.g.* infrastructures, technologies, target user groups, energy needs) and to design energy interventions that try to align, as much as possible, diverse sets of interests and expectations (??). Energy interventions can become widespread and public matters of concerns (?) with increased sense of belonging and active participation (??), if they are designed and deployed through the involvement of relevant stakeholders.

Therefore, processes for stakeholders engagement, practical means and channels for the elicitation and integration of their inputs shall be put in place for the various phases of energy interventions: preliminary studies and design, development and testing, deployment and maintenance.

## 2.3 Platform Design

### 2.3.1 Action Suggestions

This part of the application is designed and developed not only with the goal to provide users with actionable suggestions for household energy conservation in an easily accessible way, but also to facilitate the process of voluntary behavior change such that this process can be adapted and followed up (*e.g.* with one-minute use) by users in the busyness and competing priorities of their everyday life.

A list of about fifty actions<sup>10</sup> is composed to provide accurate information about actionable suggestions in the behaviour change process towards energy conservation. It is a pool of concrete household energy conservation actions based on information from credible sources such as reputable national and international energy agencies and associations. Many suggestions selected are micro-actions that are practical and inexpensive to implement in everyday life, including one-time actions such as *Use energy efficient cooktops*, routine actions such as *Line dry, air dry clothes whenever you can*, as well as in-between actions (reminders) such as *defrost your fridge regularly (in x days)*. Each suggestion has a short

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<sup>10</sup><https://goo.gl/R11QdZ>



description, accompanied by a simple explanatory note, and the corresponding effort entailed and the estimated impact (on a five-point scale). Figure 2-(1) shows an example. The action suggestions are tailored to the local (i.e. Trento and Stockholm test sites) context when needed by local project partners, reviewed by user groups, and translated into the local languages.

By way of caveat, some suggestions enlisted may seem obvious and trivial, but this does not mean that users are indeed doing them in practice. The goal of the design is to facilitate the behavior change process to bridge the attitude-behavior gap, making energy conservation actions new habits integrated in everyday household practices.

The action suggestions composed are not meant as prescriptions for what users should do for energy conservation, but to present users different ideas of what they can do and how to do it in common household practices. The users are offered with a pool of actionable options which they can freely choose from according to their own context. This line of thought in design is reflected in the way the information is framed and conveyed to the users:

- With the YouPower application, a user can follow energy conservation actions at a time. Each user has an overview (the *Your Actions* tab) of his/her own current, pending, and recently completed actions. Figure 2-(2) shows an example.

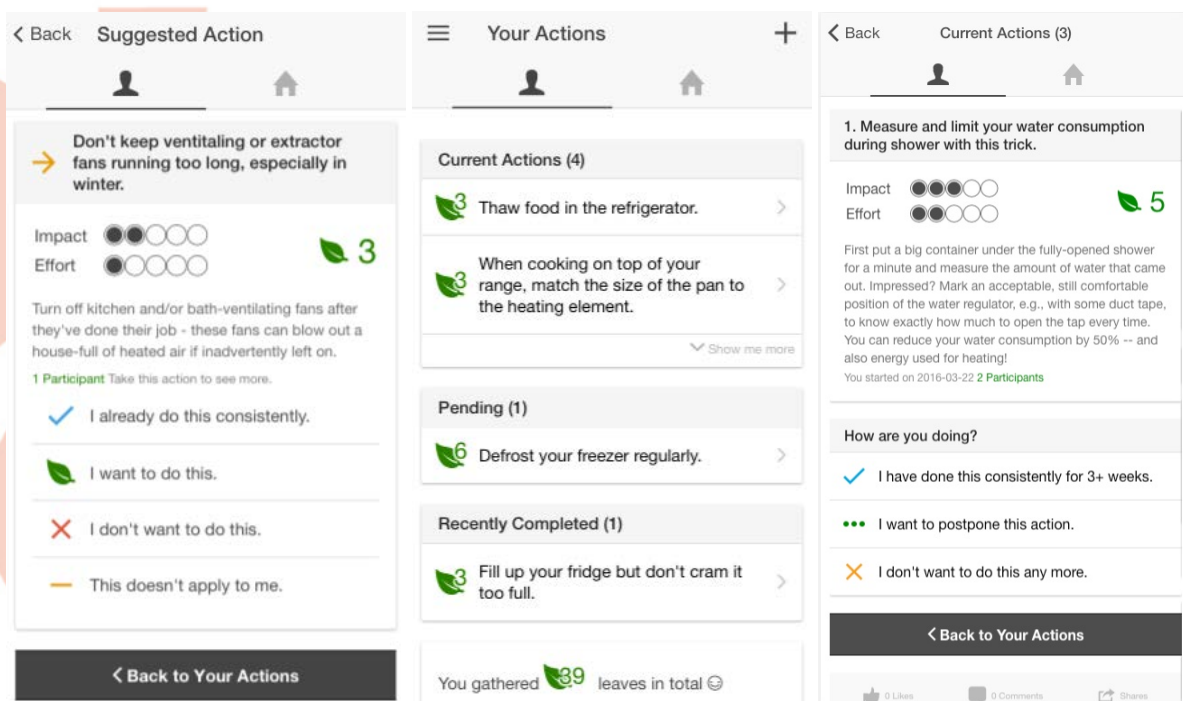


Figure 2: (1) An action suggestion; (2) User actions tab; (3) An action in progress







- A new/next action suggestion is presented to the user when an old/previous action is completed, or when the user wishes to add an action (by clicking an *Add Action* button).
- When prompted with a suggestion, the user can decide whether to take the action, or indicate that he/she is already doing it or the suggestion is not applicable to his/her situation. Figure 2-(1) shows an example. (The four options are: I already do this consistently; I want to do this; I don't want to do this; this doesn't not apply to me.)
- After a suggested action is accepted, the user may postpone (i.e. reschedule), abandon or indicate that the action is completed. Figure 2-(3) shows an example. (The three options are: I have done this consistently; I want to postpone this action; I don't want to do this anymore).
- When an action is pending (i.e. scheduled), e.g. *defrost your fridge in x days* ( $x$  is set by a user), it will be triggered by time so that the application reminds the user of the pending action.
- In application settings, the user can choose whether to repeat a completed action, reconsider a declined action, or reassess if an action is applicable to the user.


The YouPower application also uses a number of other design elements to promote users' motivation and engagement in the behavior change process. In principle, the focus is placed on providing supports for relatedness, competence and autonomy, promoting pro-environmental and altruistic values, and making one's energy conservation actions and commitments more publicly observable.

- Each action has points (displayed as *Green Leaves*) associated to the effort and impact score of that action. If a user completes an action, the user is awarded with leaves.
- A user can like (with a *Like* button) and comment on the actions (which are visible to all users). After a user completes or abandons an action, the user is asked to provide feedback (to the YouPower team). Figure 3 shows examples. The user is awarded with leaves if he/she gives comments and feedback (1 leaf each).
- The application encourages users to take small steps and gives them positive performance feedback. For example, when a user is taking up many actions, the application can prompt that *You already have x actions in progress. You can add more actions after some of those are completed. Keep on! You are doing great.*
- A user can signup and login YouPower with a Facebook account. If so, the user can "share" an action on Facebook. Figure 4 shows an example.

Back
 Action Completed

Congratulations! You will earn  5 for the action: Measure and limit your water consumption during shower with this trick.  
 You can earn  1 extra by filling the feedback form. We'd love to hear your opinion.


**Feedback Form**

Please rate the level of **effort** for this action from 1 (very low) to 5 (very high):

☐
☐
☐
☐
☐



What are your comments or tips to other users in performing this action?


Give your comments here.


Cancel

Done

Back
 Action Not Completed

Oops! Sorry to hear that you are going to abandon the action: Measure and limit your water consumption during shower with this trick.  
 You still can earn  1 by filling the feedback form. We'd love to hear from you and know how to improve.


**Feedback Form**

This action is not for you? Please select each of the following that is true to you:

☐ This action is not useful.

☐ This action takes too much effort.

☐ This action is too expensive.

☐ This action isn't applicable to you or your household any more.

☐ You don't like to do this action.

Any other reasons that made you abandon the action? Or do you have other comments?

Please specify so we know how to improve.

Cancel

Done

Figure 3: Feedback form when a user (1) completes, or (2) abandons an action



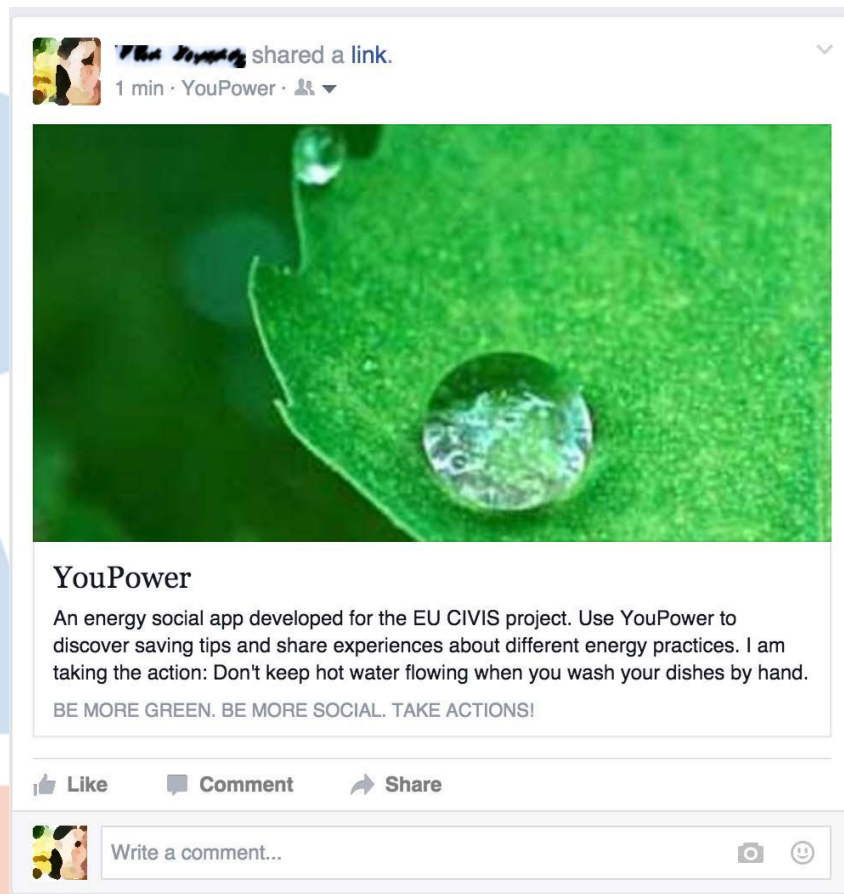


Figure 4: Facebook share of a YouPower action

- The users are presented with the information about how many users have been taking an action (including Facebook friends when logged in through Facebook).
- A user can configure a personal profile and household profile.
- A user can add members to his/her household; Figure 5-(1). If so, the user can see the actions of household members; Figure 5-(2), and add the actions to his/her own action list.
- A user can send friends Email invitations to join YouPower (Figure 6).

The intention of the design (besides those already mentioned) can be highlighted as follows. For the options of choosing actions, see e.g. Figure 2-(1) and Figure 2-(3), first person narrative (e.g. *I don't want to do this*) is used to create a personal micro-environment for the user (?) to have a moment of self-reflection on his/her own energy conservation actions, e.g. *Does this action make sense to me (or my household)? Am I indeed doing this?*

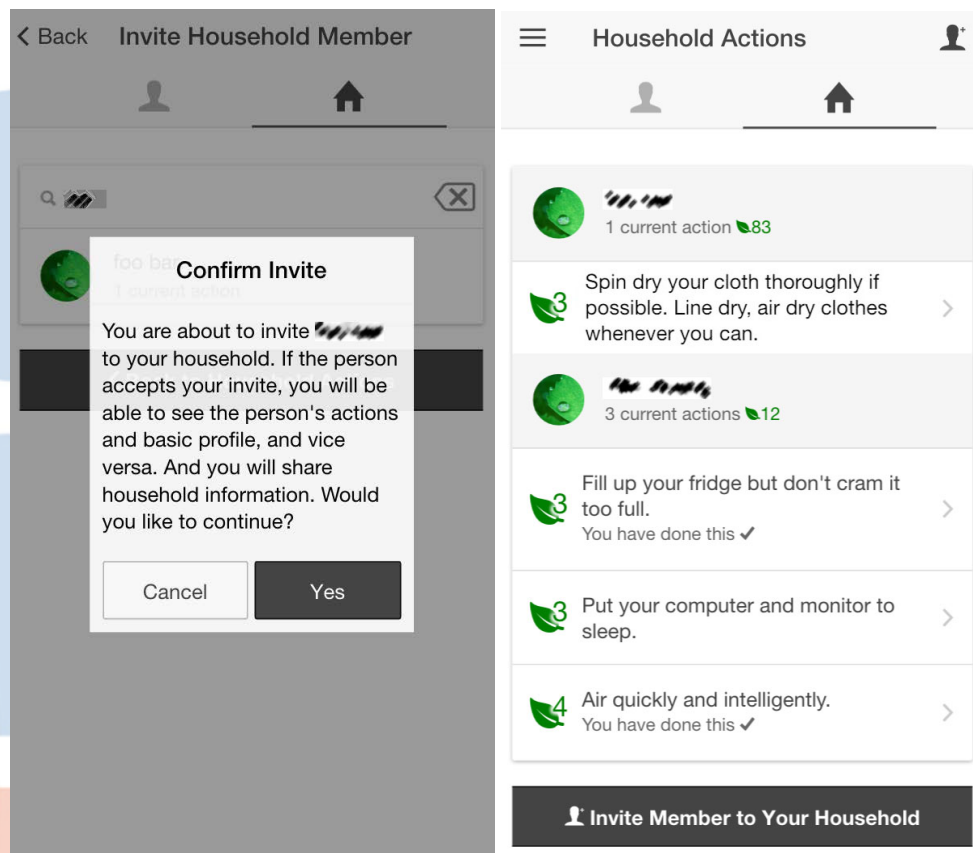




Figure 5: (1) Invite household member; (2) Household member actions


*Do I want to do this?* By doing so, the user can identify whether an action is feasible in her/his own context, and whether there is an attitude-behavior gap present with regard to that particular action, and if so should he/she (and would he/she like to) change it; see e.g. Figure 2-(1) and Figure 2-(3).

For the framing of the actions, feedback forms, and other parts of the YouPower interface such as prompt messages, *we* is used referring to the YouPower team, and *you* to address the user (see e.g. Figure 3). This “talk like a person” technique (communicating with the participants in a human voice) is often used in designing social interfaces to adopt a conversational tone which provides an opportunity for users to enter into a dialog with YouPower, creating a non-solipsistic and receptive state of mind (?). “Self-deprecating message” are used e.g. when a user abandons an action (“Oops! Sorry to hear that you are going to abandon the action”), and when there is no results for a search (“We can not find ‘foo bar’ among YouPower Users”). Error messages and alike should always put the blame squarely on the shoulders of the product’s owners and not on those of the users (?).

Users can freely choose whether (and when) to take an action and possibly resched-

< Back Invite Household Member


 

Q  

Sorry, we can not find 'Wally Power' among YouPower users. Please try another name.

[< Back to Household Actions](#)

Can not find the one you are looking for?

Receiver's Email address 

Receiver's name

Send Invitation

### Invitation from "Wally Power" to join YouPower



Hi there,

"Wally Power" joined YouPower and is inviting you to join as well. YouPower is a free energy social app that is simple and fun to use.

[Join Now](#)

With YouPower you can find answers to your questions about different energy practices and save energy together with your family, friends or neighbors. Sign up to discover more.

Thanks, have a lovely day!

[YouPower Team](#)

Figure 6: Send Email invitation to join YouPower

ule and repeat the action according to their own needs and interests. After all, users are experts of their own reality. This makes individual actions and the series of actions suitable in the context of the user's everyday household practices so that he/she can adapt and follow the process of action-taking at a pace that suits his/her situations. Users have free choices of actions as revocable self-commitments, as well as whether to give feedback and invite household members or new users, etc. This facilitates the sense of autonomy which enhances and maintains motivation. Users' choices, e.g. the commitment to an action, the completion or cancellation of an action, together with the other user inputs such as comments and feedback, etc., make a good data source for further research and personalization of the content.

With an in-context email form (see e.g. Figure 6), a user can send an invitation to a friend asking to join YouPower. The benefits of joining and participating in YouPower are clearly articulated to the recipient in the email with a "call to action" button (?). A user can also send household member invitations and act upon them after receipt. By creating households and adding household members, users can have an overview of the household actions. Household energy conservation needs joint efforts, and household members can



share the responsibility. The social features such as *Like, Comment, Share, Invite* add social dynamics among users who can share and discuss their experiences and reflections with others.

## 2.3.2 Housing Cooperatives

### 2.3.2.1 Aim and target group

The housing cooperative part of the application is used by housing cooperatives in *Hammarby Sjöstad*, Stockholm Test Site. This part provides features for building level energy information and actions.

All apartment owners in Sweden have to be members of a housing cooperative that owns the building. A board is elected among the members and the board is in charge of the cooperative's finances and maintenance of the building. This work may include deciding on energy contracts, making sure energy systems are maintained and proposing investments in more energy efficient technologies. People in the board are volunteers who may have no previous knowledge of energy or building management. Hence, the housing cooperative part of the app aims to support board members in energy management work and, more specifically, in taking energy reduction actions.

In Hammarby Sjöstad, some of the housing cooperatives have an appointed energy manager in the board who is responsible for the energy work. This role, no matter if it is explicitly named energy manager or if it is an implicitly shared responsibility among several board members, is the primary target for the housing cooperative part of the app. The app can also be used by other housing cooperative members who are interested in following the energy work of the cooperative. A third type of user is energy or building management companies working with housing cooperatives. All information in the app is visible for all these user groups and shared between housing cooperatives. This openness of energy data is key to facilitating the users in sharing experiences relevant for taking energy reduction actions.

### 2.3.2.2 Linking energy data to energy reduction actions

One of the main housing cooperative features of the app is that it allows for linking energy data with energy reduction actions taken, which makes it possible to follow up on the impact of energy actions (see Figure 7). The energy use is divided into heating and hot water (from district heating) and facilities electricity and the user can switch between these views in the energy use graph (see Figure 7, left). The user can also choose between viewing energy use per month or per year. This provides enough level of detail to show overall changes in energy use. Since the energy data is shared between cooperatives there may also be privacy concerns related to opening up data of higher granularity to people outside of the own cooperative.

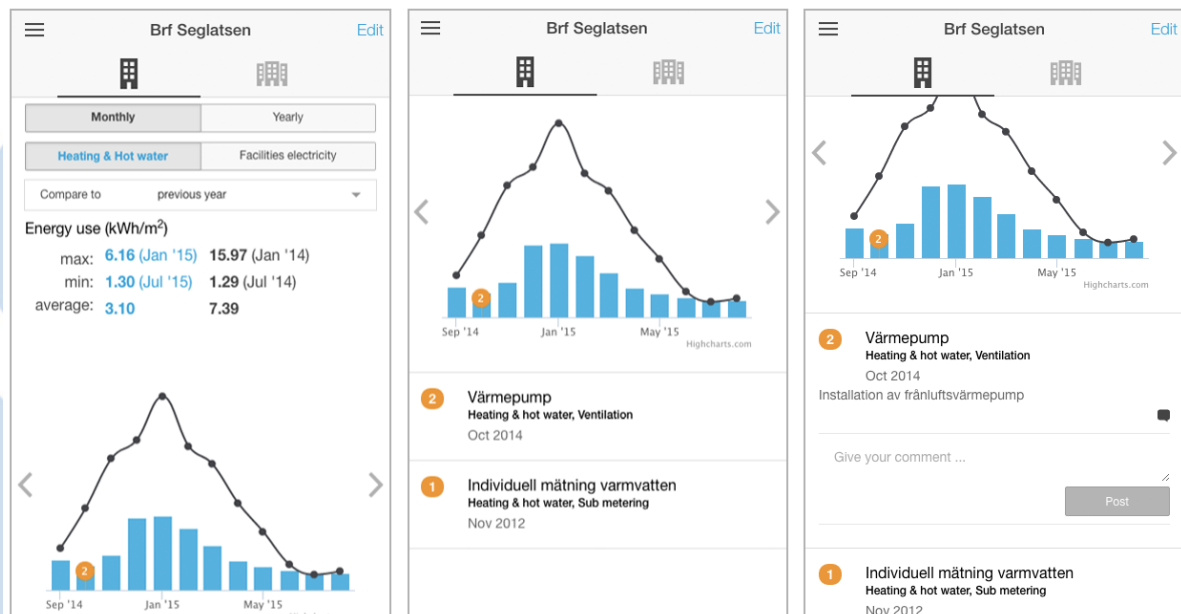


Figure 7: Energy use graph where the blue bars show the current year's energy use and the black line shows the previous year's energy use. Energy reduction actions taken are mapped to the graph and listed below.

Users with editing rights, typically energy managers or other boards members, can in the app add energy reduction actions that the cooperative has taken, including information about:

- Title of the action.
- Type of energy action (e.g. heating optimisation, action affecting the ventilation or action to make lighting more efficient). The action types are in the form of tags (more than one can be added to each action), which makes it possible to add functionality for filtering or searching for specific actions.
- Month and year the action was taken or completed.
- Cost for taking the action.
- Additional details about the action.

Energy or building management companies that work with a cooperative can also get editing rights and add energy reduction actions they take on behalf of the cooperative. Added actions appear in the energy use graph at the month when each action was taken and all actions are listed below the graph. When clicking on an action in the list, the action is expanded and the details of the action are shown.



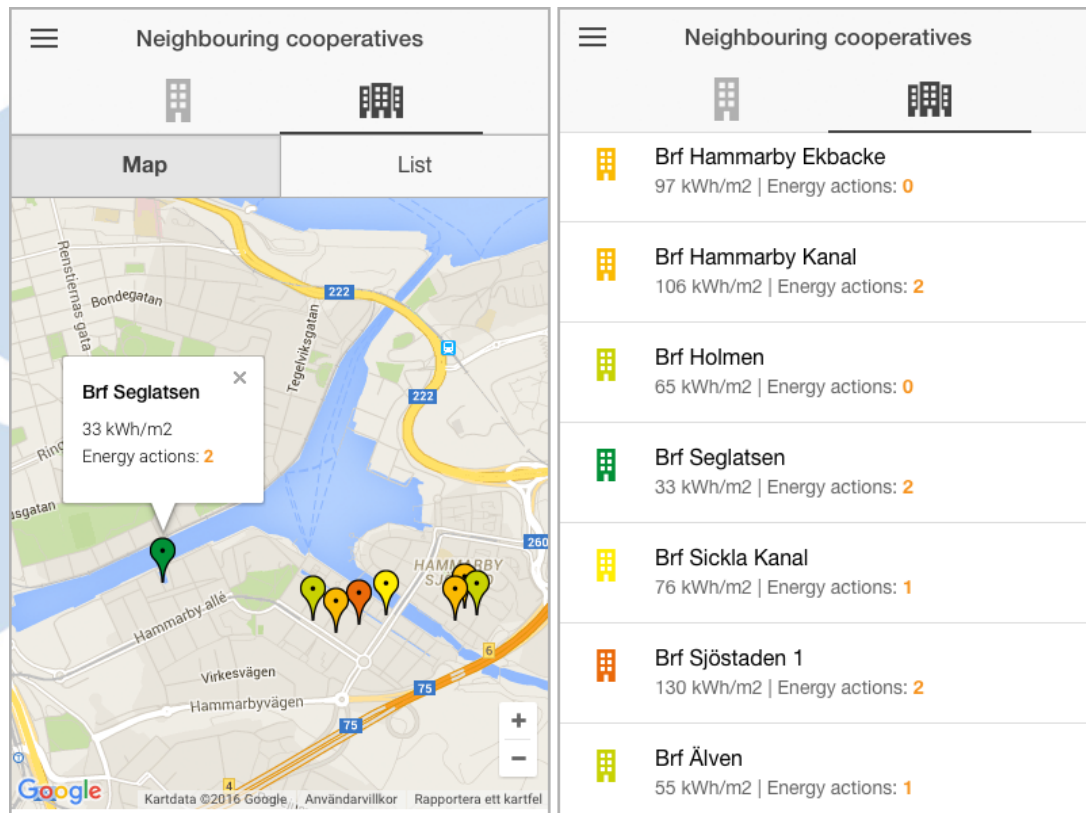


Figure 8: Map and list view of participating housing cooperatives. The energy performance of the cooperatives is indicated by colour and in numbers.

To make the impact of energy reduction actions visible, the user can choose to compare the energy use of the viewed months to the energy use of the same months the previous year. This can be used for example when a housing cooperative wants to explore what energy reduction actions to take in the future by looking at the actions taken by other cooperatives and what the effects were in relation to costs.

### 2.3.2.3 Comparing housing cooperatives

A user can see all cooperatives who are using the app in a map view or list view (see Figure 8). To facilitate comparison between cooperatives the icons in the map and list are colour coded based on each cooperative's energy performance, i.e. the energy use per square meter heated area (kWh/m<sup>2</sup>). It uses a scale from red to green, where a red colour indicates a poor energy performance (i.e. high energy use) and a green colour indicates good energy performance (i.e. low energy use). The energy performance scale is calculated in a



similar way as for the Swedish energy declaration for buildings<sup>11</sup> but it is calibrated to only include measured energy use for heating and hot water, which is the greatest part of the energy use. In the Swedish energy declarations, facilities electricity is also added but that often requires estimations of different factors to make the number comparable.

For each cooperative in the list or on the map, the user can also see the energy performance as a number (kWh/m<sup>2</sup>) and the number of energy reduction actions taken. The number of actions is important to display to make energy reduction efforts of housing cooperatives with a high energy performance (e.g. due to poor construction of the building) visible.

The energy managers in the project stressed that it is important to know what type of housing cooperative you are comparing your own to, in order to understand what any differences in energy performance may depend on and which of their experiences could be relevant for the own cooperative. Therefore, the app provides the following information about each cooperative (see Figure 9):

- Number of apartments in the cooperative.
- The cooperative's heated area (m<sup>2</sup>).
- The building's construction year.
- Type of ventilation (e.g. with or without heat recovery).

While the energy performance provides a comparison of the current situation, there is also a feature for comparing a cooperative's energy use over time to the neighbourhood average (see Figure 10). In the energy use graph for each cooperative, divided into heating and hot water and facilities electricity, the user can display the average energy use of the other cooperatives using the app. In that way, the user can get an idea of how a cooperative's energy use has changed over time in relation to other cooperatives. To make the energy use comparable between cooperatives, the energy in the graphs is (in the same ways as the energy performance) displayed as energy use divided by heated area (kWh/m<sup>2</sup>).

#### 2.3.2.4 Sharing experiences

The details about each energy action taken by a cooperative, together with the effects on the energy use, provides information that could support other cooperatives in learning more about which energy reduction actions are effective. However, a cooperative that is interested in taking an action may want more information than what is provided by the person adding the action, e.g. regarding how to take an action, which contractor was used for an investment or how to get buy-in from the cooperative members. The app supports this

<sup>11</sup><http://www.boverket.se/sv/byggande/energideklaration/energideklarationens-innehall-och-sammanfattning/sammanfattningen-med-energiklasser/energiklasser-fran-ag/>



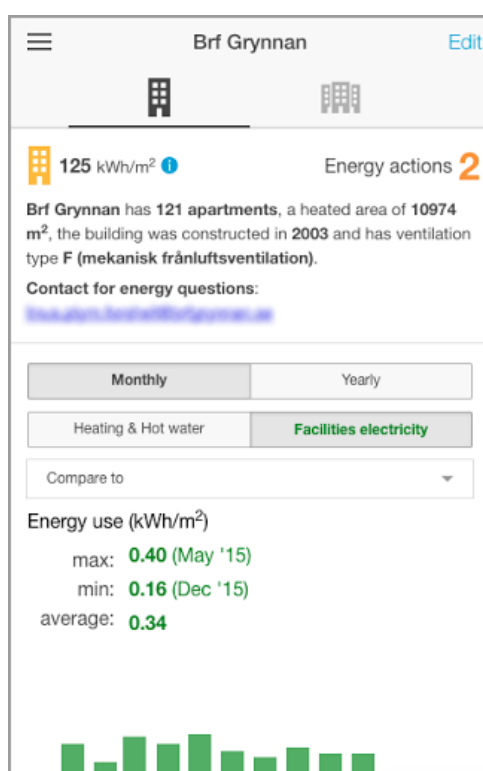


Figure 9: Information about the housing cooperative that is important for understanding the energy performance and actions taken is displayed in the top of the page.

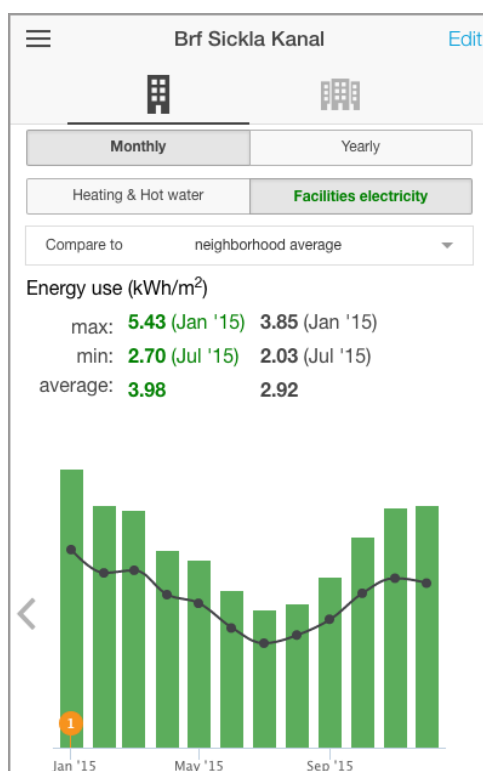


Figure 10: The green bars show the monthly facilities electricity use of the housing cooperative and the black line shows the average facilities electricity use for all housing cooperatives using the app.



through a commenting function for each action added, where users can post questions related to the action. The cooperatives can also choose to add an email address to their energy contact person, which is visible on the cooperatives app page, to allow for direct contact.

Sharing of experiences of course also happens outside of the digital world, e.g. during housing cooperative board meetings or meetings with the local energy network in Hammarby Sjöstad. The app is aiming to support discussions and knowledge exchange also in such situations, and it should be easy for someone who wants to demonstrate the impact of an energy investment to just take out the smart phone and show the visualization. Consequently, the mobile screen format is an important part of the design.

### 2.3.3 Energy Awareness at Individual and Collective Levels

This part of the application is designed and developed to enable an informed approach to “fair energy use”<sup>12</sup> by making people aware of their energy behaviors in individual and collective terms. It includes means for users to visualize in an easily understandable and actionable way a specific set of energy measurements, simple analytics and a time-of-use (ToU) signal. From a general point of view, this part of the app is meant to support the collective demand side management action that is described within the project use case<sup>13</sup> and which aims at subsidizing such collective action through the “energy bonus” made available from the two Energy Cooperatives.

The access point for this part of the app is the “Energy Data” navigation tab (Figure 11). This tab gives access to an overview of the various functionalities and visualizations of specific information: “Energy Meteo”, visualization of consumption and production data (real time and historical), “Comparisons” data.

There are three main categories of information provided through this part of the app:

- ToU signal
- Visualization of real time and historical data (individual level)
- Comparative visualizations (collective level)

Although the direct impact of these kind of information can be debated – reported reductions ranging from 2% to 20% (?) and the fact the their medium and long-term implications received some criticisms (with particular regards to normative “eco-feedback” (??)), this part of the app is in-line with the needs emerged from the pilot sites and the project

<sup>12</sup>Simply understood as people using energy while being conscious of their individual energy footprint and the resulting impacts.

<sup>13</sup>To fully realize such use case, the deployment of the external service “Participatory Budgeting portal” was needed. This service is described below in the last part of this subsection. For a detailed and comprehensive description of this use case, see CIVIS Deliverable 1.3, Annex 1 - “Energy Garden” user story.

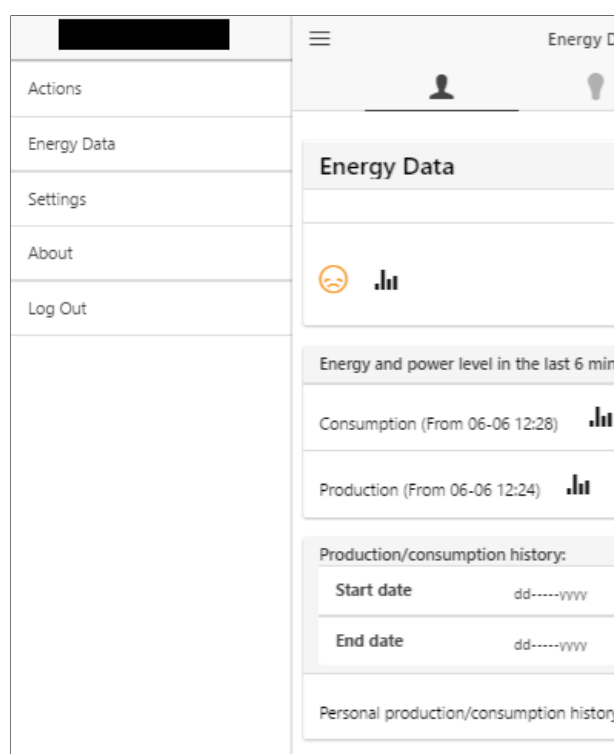


Figure 11: Navigation tab with access to the feature for energy awareness: “Energy Data”

activities<sup>14</sup>. It also addresses the fact that improvements of dwellers’ energy awareness remain a necessary condition towards the long-term adoption of more sustainable behaviors, although not sufficient alone. Indeed, this part of the app has been designed with broader processes of social change in mind<sup>15</sup>. Therefore, “energy awareness” should be considered as instrumental to well defined individual and collective efforts.

### 2.3.3.1 “Energy Meteo”: the Time-of-Use (ToU) signal

This feature is designed to leverage load elasticity for maximizing Energy Cooperatives’ self-consumption. It has the twofold effect of optimizing usage of RESs installed by the Energy Cooperatives and minimizing their dependency from national energy grid. Concrete goal of this feature is to support shifts of electric consumption loads to time-periods characterized by high local production from renewable energy sources. Therefore, Energy Meteo provides users with a clear indications on the actual status of the local grid and a

<sup>14</sup>Requirements analyzed as reported in Deliverable 3.1. Design concept validated as reported in Deliverable 3.2.

<sup>15</sup>For further details, see the User Story “Energy Garden” included in Deliverable 1.3.

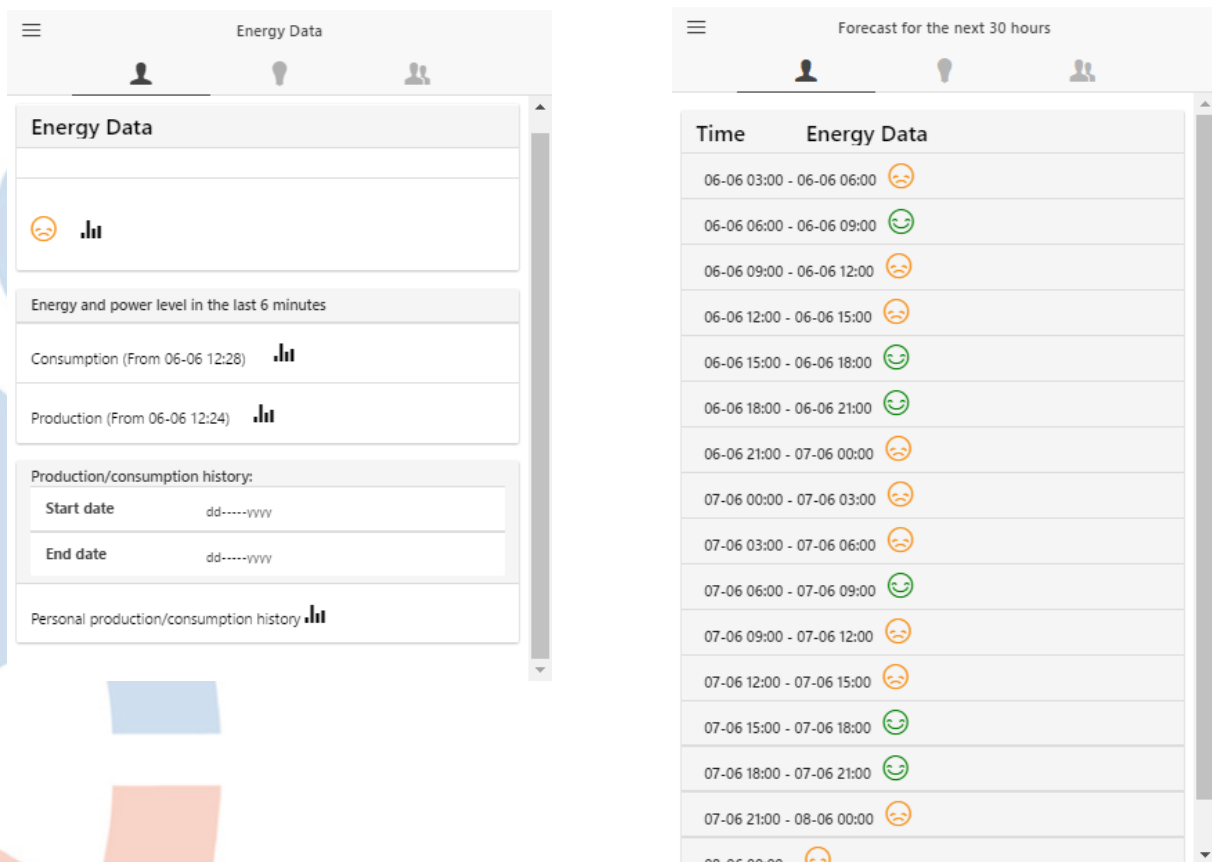


Figure 12: (1) “Energy Data” main screen: overview of the various functionalities and easy access to visualization of specific information; (2) ToU signals with a 30-hours forecast, divided by 3-hours slots.

30-hours forecast<sup>16</sup> green smiley signal slots when local production exceeds demand; red smiley highlight slots when demand exceeds local production.

The ToU signal is provided in two distinct ways:

**Current.** It is available on the main screen (Figure 12-1) and it indicates whether *present* moment is a good (“green smiley”) or bad moment (“red smiley”) to consume locally produced electricity.

**Forecast.** It is available by clicking on “Energy Meteo” field and it provides a detailed overview of the local grid conditions, forecasted in 3-hours time-slots, for the forthcoming 30 hours (Figure 12-2). A new forecast is generated every 24 hours<sup>17</sup>.

<sup>16</sup>Appendix B, in CIVIS D4.3 *Energy ICT Platform - Platform Enablers*, describes in details the technical design and implementation for the predictive model that is the basis of the Time-of-Use signal and the forecast.

<sup>17</sup>From the point of view of interaction with back-end, this visualization relies on the service

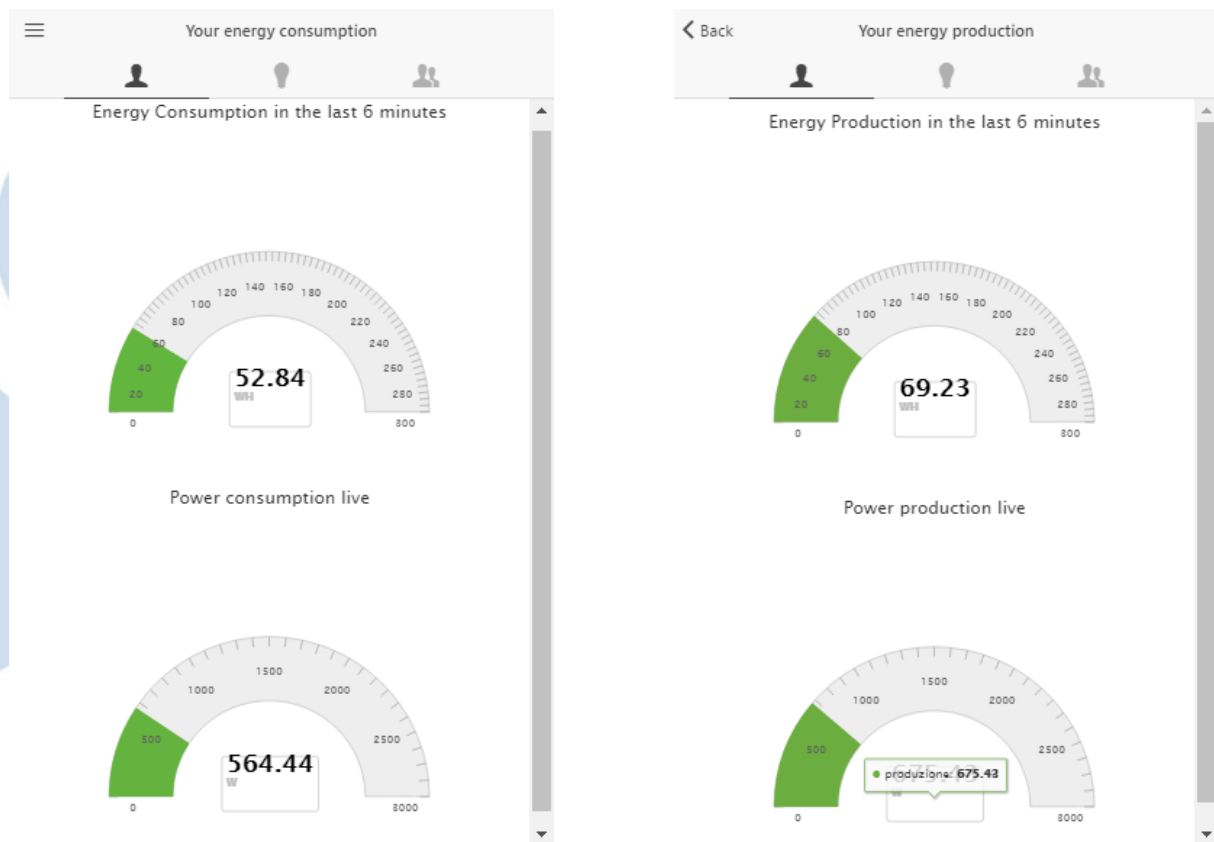


Figure 13: (1) Energy and Power meters for household's electric consumption measurements; (2) Energy and Power meters for household's electric production measurements.

### 2.3.3.2 Visualization of consumption and production (real time)

It is designed to inform users about their (near to) real time electric consumption and (where available) production data.

Users can access these information from the "Energy Data" main screen and either visualize the household's electric consumption (Figure 13-1) or household's electric production (Figure 13-2). These visualizations provide meters for:

**Energy.** It appears at the top part of the screen and it accounts the most recent 6 minutes monitored. This information is graphically shown through the 'meter' and also displayed in numbers for an easier reading.

hosted on the WP3 platform which exposes the signal forecasts at the specific addresses <http://217.77.95.103/api/tou/sanlorenzo>, <http://217.77.95.103/api/tou/storo>, <http://217.77.95.103/api/tou/sanlorenzo/current>, <http://217.77.95.103/api/tou/storo/current>.

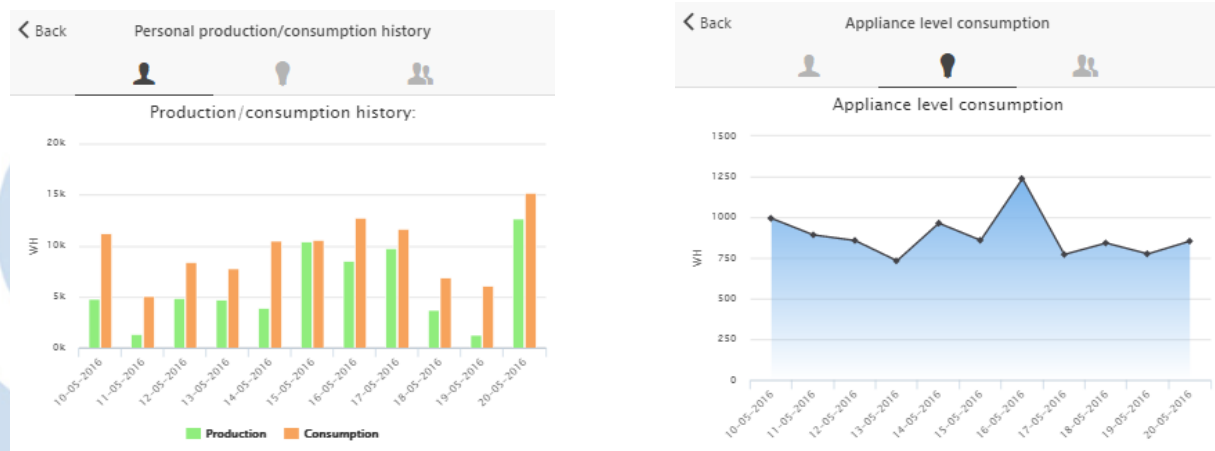


Figure 14: (1) Household overview of electric energy consumption and production, for the chosen data range; (2) Consumption patterns for the chosen data range at appliance level.

**Power.** It appears at the bottom part of the screen and it provides instant measurement<sup>18</sup>. This information is graphically shown through the “meter” and also displayed in numbers for an easier reading.

### 2.3.3.3 Visualization of historical data

This feature is designed to provide users with a broader temporal overview on their energy habits. Information about historical data are available both for household and appliance levels:

**Household.** It provides a daily overview of the overall electric energy consumption and production for the chosen data range. This shall give a basis for dwellers to understand and improve their self-consumption.

**Appliance.** It provides a detailed view of the consumption patterns for the selected appliance. Visualized appliances are the ones equipped with smart plugs.

Selection of data ranges are mandatory for these visualizations. They must be set by users at two different places: in the “Energy Data” main screen for the *Household* category; in the “light-bulb” sub-view for the *Appliance* one, which is accessible from the top level bar.

<sup>18</sup>For technical reasons and depending on several environmental factors (e.g. households connectivity for transfer of monitored data) there may be up to approximately 2 minutes delay between the actual power measured and the data displayed through You Power.



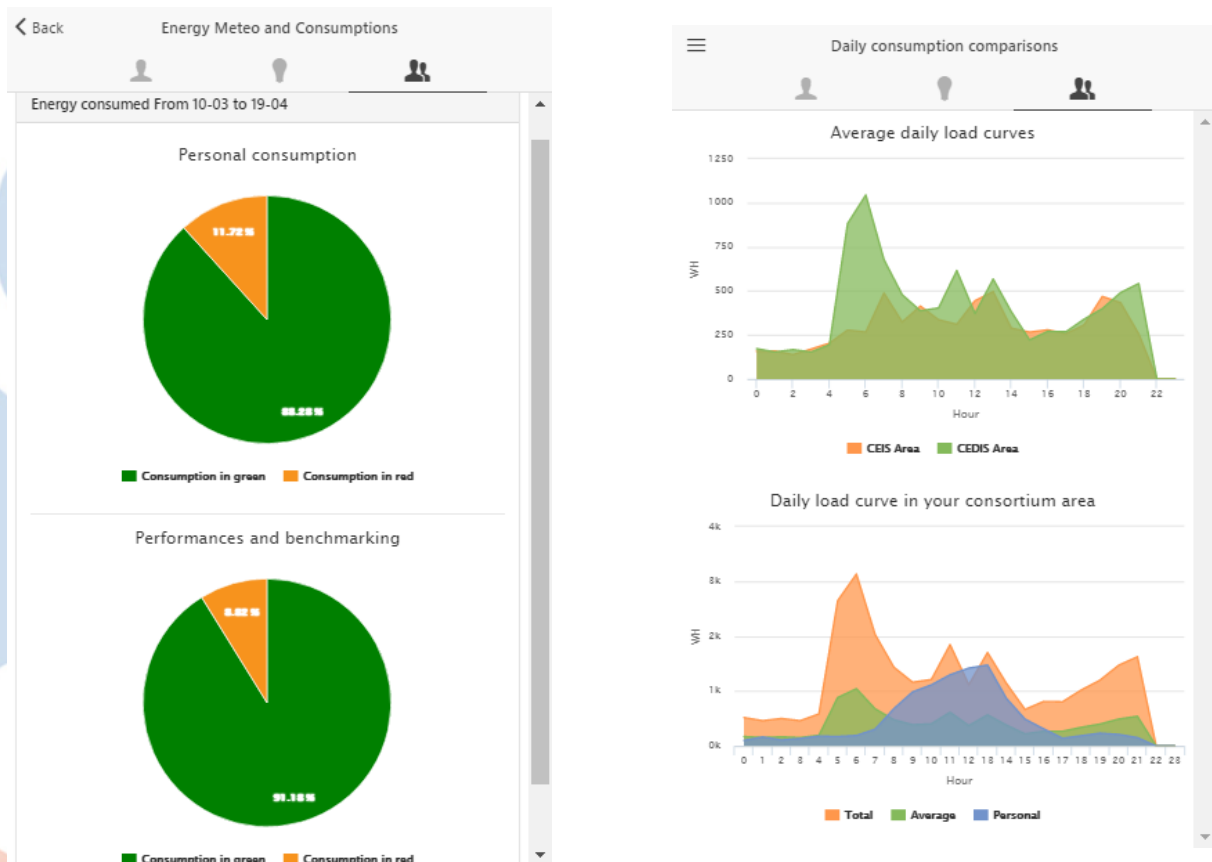


Figure 15: (1) Compares individual consumption with community one with regards to the distribution between the delivered ToU signals; (2) Shows the average consumption load curves at the level of the two local consortia and compares the individual curve with the average and the total of the related Consortium area.

#### 2.3.3.4 Visualization of comparisons

Comparisons are designed to provide users with reference information about energy performances or behaviors in relation to the neighborhoods. There are two type of comparisons that can be visualized through YouPower:

**Consumption distribution on ToU signals** It shows a cumulative and progressive distribution of consumption between the green and red ToU signals. On the top part it shows the individual household chart, while on the bottom, the community<sup>19</sup> total distribution. This view is a static one and is progressively updated on a weekly basis. The descriptive label for the chart clearly highlights the reference period considered.

<sup>19</sup>In this case community refers to the registered users who are served by the same Energy cooperative through the same local distribution network.



**Consumption profile benchmark** It provides users with a benchmark<sup>20</sup> of consumption profile – *load curve*. It provides two graphs. At the top part of the screen the load curves are shown as households average grouped by the two Cooperatives. At the bottom part, household's load curve is compared with the average and the total of the related Cooperative. These information are available only at a daily level. Therefore, users have to select the day (available starting from the previous day and backwards) for which they want to visualize such benchmarks

These features can be accessed by clicking on the “community” icon, which is symbolized by the two people on the top level bar.

### 2.3.3.5 External service for “Donation”: Participatory Budgeting portal

The Participatory Budgeting portal is an external service<sup>21</sup> designed to accompany users along their efforts of changing their energy behaviors.

Participatory budgeting is a democratic deliberation process for the allocation of public resources. In the CIVIS context, the resource to be allocated through a public and transparent process is energy (KwH), by means of an “energy bonus” made available by the Energy cooperatives in connection to KwH consumed under the green smiles ToU signal.

The portal is implemented as a website with the goal to:

- detail the conditions and regulations for the participatory budgeting process;
- submit idea proposals for the awarding of the “energy bonus”;
- update involved users about the proposals received;
- inform users about the various steps along the evaluation and selection procedures for the awarded proposals.

The Participatory Budgeting portal can be reached at <https://progettocivis.wordpress.com/>.

---

<sup>20</sup>While in principle homogeneous groups of users could be identified to make the comparison more sound, this requires data (household composition, size of dwelling, type and number of appliances preset, thermal isolation ...) which are not currently available for the vast majority of the users engaged in the pilot. Furthermore, the heterogeneity and limited number of users involved would not allow to form meaningful groups for creating sound averages and benchmarking. For this reason the simple community average is used as a benchmark.

<sup>21</sup>This service was initially intended for integration in YouPower as the “Donation” tab (For reference, see CIVIS Deliverable 3.2, Tab 4). However, since the required functionalities for this service emerged along the construction of the Budgeting process itself, then a more flexible and easy-to-change tool was needed, other than hardcoding it into YouPower. For this reason we explored the key functionalities for “Donation” tab through the Participatory Budgeting external service.

### 2.3.4 YouPower Application Navigation Structure

The side navigation (nav) of the YouPower front-end application is composed of six items, among which the “Housing Cooperatives” (Sec. 2.3.2) or “Energy Data” (Sec. 2.3.3) is activated respectively when a user is a member of a housing cooperative (the Swedish case) or after a user authenticated his/her household’s account for energy data (production is only for the Italian test site); see for example Figure 11, which depicts an Italian case with an open side navigation drawer. Except for the “Log Out” item, each nav item is associated with at least one tab item, which in turn has different views. Table 2 presents the navigation structure of the YouPower application.

Table 2: YouPower app navigation structure

Side Nav Items	Tab Items	Views
Actions	Your Actions	Current Actions (and view/add Comments, Like, Share), Completed Actions (and view/add Comments, Like, Share), Suggested Action, Postpone Action, Action Completed (Form), Action Completed (Form)
	Household Actions	Invited to Your Household, Pending Invites, Members, Actions (of household members), Invite Household Member (search and invite), Send an Invitation by Email
Energy Data	Household Level	Current Tarif (Trentino only), Current Consumption, Current Production, Historical Production/Consumption Patterns, Forecasted Tariffs (Trentino only), consumption comparison in High and low energy tariff, Consumption comparison with total and average consumption of a test site (Trentino only)
	Appliance Level	Consumption Patterns and ‘last-reading’ update (most recent time that consumption data is provided by Energy ICT platform) for each monitored appliances

	Community Level	Total Community Consumption (last month), Total Community Production (last month), Community Energy Balance, Comparison with Benchmark, Total Community consumption in high and low energy Tariff (Trentino only), Daily consumption comparison between Municipalities (Trentino test sites)
Housing Cooperatives	<i>Name</i> (of ones own cooperative)	Cooperative Actions, Consumption (Monthly / Yearly, Heating & Hotwater / Facilities electricity, Compare to neighborhood average / previous year), View/add discussion
	Neighboring Cooperatives	Map/List (of cooperatives and actions)
Settings	Settings	Configurations of actions, Link to Facebook
	Personal Profile	Email, Name, Testbed location, Preferred Language, etc.
	Household Profile	Cooperative (if applicable), size, Household Composition, etc.
About	About	Q&A List, Contact
Log Out		

### 3 CIVIS Platform Development

The development of the CIVIS platform started in May 2015 (?) and continued in the third year's WP3 activities. At the time of writing this deliverable (May/Jun 2016), the development is completed with minor updates took place in the past month. The JavaScript (JS) programming language is used for development at both front- and back-ends. Figure 16 provides an overview of the major technologies used at the front-end and back-end. They are discussed in this section.

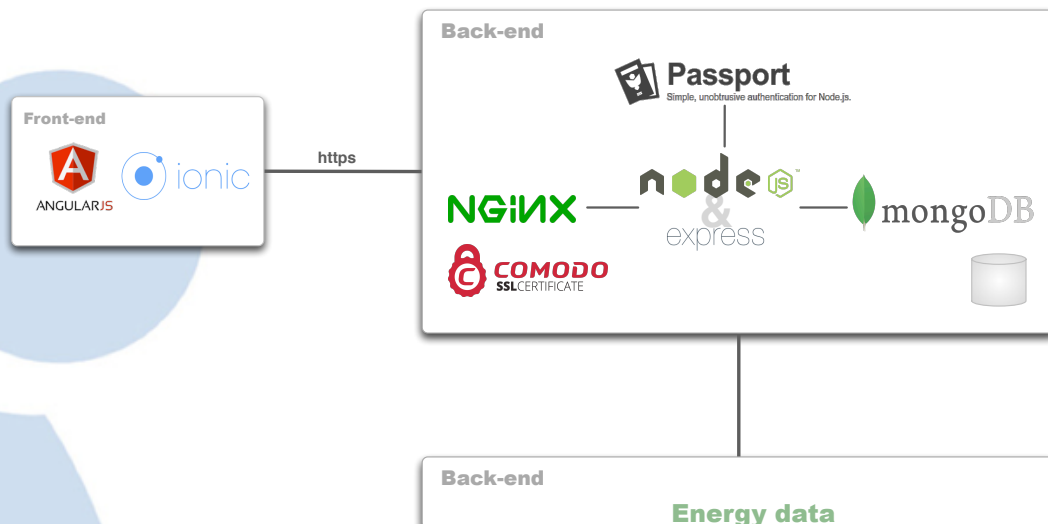


Figure 16: WP3 front-end and back-end overview (“Energy data” is covered by WP4)

### 3.1 CIVIS Front-end as a Hybrid Application

The CIVIS front-end (YouPower) is developed as a hybrid (cross-platform) mobile application using Ionic<sup>22</sup>, an HTML5 front-end development framework built with SASS<sup>23</sup> and optimized for AngularJS<sup>24</sup> (a.k.a Angular). The Ionic framework comes with native-styled mobile UI (User Interface) elements and layouts, and handles the look and feel and the UI interactions the app needs in order to be compelling<sup>25</sup>.

Angular as a JS framework provides directives (extensions of HTML attributes) and two-way data binding (binds input or output data of the view to a model) that simplify the app development with Model-View-Controller (MVC) architecture. In two-way data binding, the value of a data model is passed on from the view (or loaded from the back-end) to the controller at run-time, and the function in the controller returns the result (of the value manipulation) to the view. Other noteworthy JS and Angular libraries besides Ionic we used for the front-end development are as follows:

- Highcharts<sup>26</sup>, a charting library in JS. It provides an easy way to add interactive charts to the application.
- Highcharts-ng<sup>27</sup>, a simple Angular directive for Highcharts.

<sup>22</sup><http://ionicframework.com/>

<sup>23</sup><http://sass-lang.com/>

<sup>24</sup><https://angularjs.org/>

<sup>25</sup><http://ionicframework.com/docs/guide/>

<sup>26</sup><http://www.highcharts.com/>

<sup>27</sup><https://github.com/pablojim/highcharts-ng>





- Angular-translate<sup>28</sup>, an Angular module for internationalization and localization of the application. (YouPower is currently available in English, Swedish and Italian.)
- Angular-resource<sup>29</sup>, an Angular module for interacting with RESTful server-side data sources.
- Underscore.js<sup>30</sup>, a JS library that provides over 100 utility functions.
- Bootstrap-sass<sup>31</sup>, a Sass-powered version of Bootstrap 3.
- Moment.js<sup>32</sup>, a JS library to parse, validate, manipulate and display dates.
- Ion-datetime-picker<sup>33</sup>, a date and time picker for the ionic framework.

### 3.2 CIVIS Back-end as a JS Runtime Environment

The YouPower back-end is developed using the *Node.js*<sup>34</sup> platform, a well-known JS based open source runtime environment for server-side applications. The platform is easily extensible and has a repository of libraries that support fast web development. TU Delft prepared a virtual machine for CIVIS to host the WP3 back-end<sup>35</sup> using *Nginx*<sup>36</sup>, an http and reverse proxy server. A *Comodo*<sup>37</sup> SSL certificate is installed on the server to provide secure communication (i.e. https).

*MongoDB*<sup>38</sup> is used as the WP3 back-end database. It is document-oriented, and has flexible data schema and expressive query language. A list of the data models at the back-end can be found at <https://github.com/CIVIS-project/YouPower/tree/master/backend/models>. Figure 17 shows the data model schema.

The noteworthy Node.js libraries used for the WP3 back-end development are as follows:

- Async.js<sup>39</sup>, which makes managing and combining asynchronous tasks easier.

<sup>28</sup><https://angular-translate.github.io/>

<sup>29</sup><https://docs.angularjs.org/api/ngResource>

<sup>30</sup><http://underscorejs.org/>

<sup>31</sup><https://github.com/twbs/bootstrap-sass>

<sup>32</sup><http://momentjs.com/>

<sup>33</sup><https://www.npmjs.com/package/ionic-datetime-picker>

<sup>34</sup><https://nodejs.org/>

<sup>35</sup><http://civis.tbm.tudelft.nl>

<sup>36</sup><https://nginx.org/en/>

<sup>37</sup><https://ssl.comodo.com/>

<sup>38</sup><https://mongodb.org/>

<sup>39</sup><https://github.com/caolan/async>

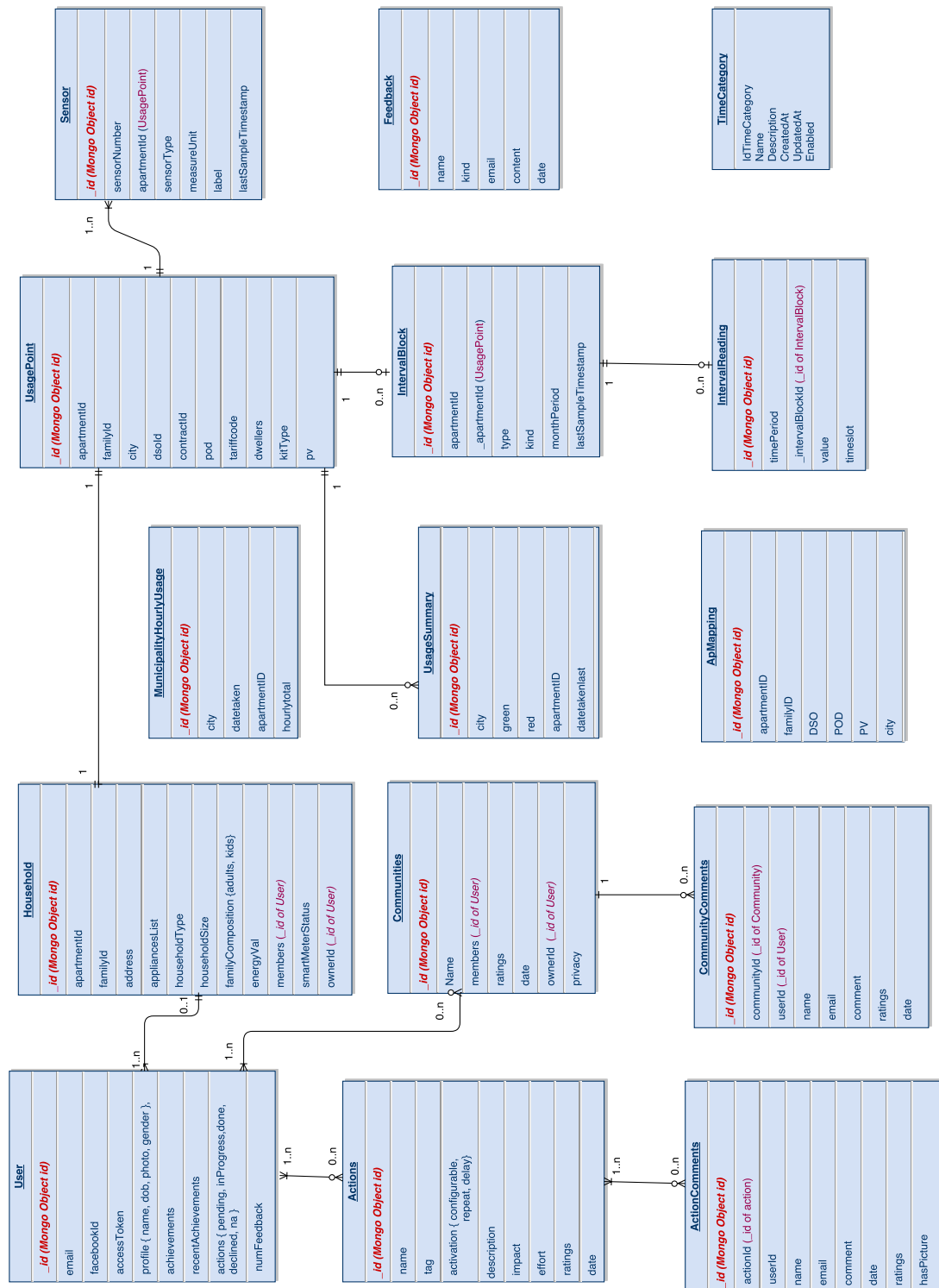


Figure 17: YouPower back-end data model schema



- Express.js<sup>40</sup>, a Node.js application server framework we use as a basis for the REST API.
- Mocha<sup>41</sup>, a JavaScript unit test framework.
- Mongoose<sup>42</sup>, a MongoDB driver for Node.js. It provides a schema-based solution to model data.
- Passport.js<sup>43</sup>, for handling authentication of REST API requests for Node.js, both local (username password) and Facebook.
- Underscore.js<sup>44</sup>, a JS library that provides over 100 utility functions.
- Nodemailer<sup>45</sup>, sending emails with Node.js.
- Email-templates<sup>46</sup>, a Node.js module for rendering beautiful emails.
- Fb<sup>47</sup>, a Node.js library for Facebook.
- Moment.js<sup>48</sup>, a JS library to parse, validate, manipulate and display dates.
- Apidoc script<sup>49</sup>, for inline documentation for the REST API.
- Node-xml2js<sup>50</sup>, a simple XML to JavaScript object converter.
- Dateformat<sup>51</sup>, for formatting dates to custom formats.
- HTTPS<sup>52</sup>, A nodeJs module used to make service calls over TLS/SSL.
- Querystring<sup>53</sup>, for deserializing querystring to an object.
- Fs<sup>54</sup>, for manipulating file in NodeJS.

---

<sup>40</sup><http://expressjs.com/>

<sup>41</sup><https://mochajs.org/>

<sup>42</sup><http://mongoosejs.com/>

<sup>43</sup><http://passportjs.org/>

<sup>44</sup><http://underscorejs.org/>

<sup>45</sup><https://nodemailer.com/>

<sup>46</sup><https://www.npmjs.com/package/email-templates>

<sup>47</sup><https://www.npmjs.com/package/fb>

<sup>48</sup><http://momentjs.com/>

<sup>49</sup><http://apidocjs.com/>

<sup>50</sup><https://github.com/Leonidas-from-XIV/node-xml2js>

<sup>51</sup><https://www.npmjs.com/package/dateformat>

<sup>52</sup><https://nodejs.org/api/https.html>

<sup>53</sup><https://www.npmjs.com/package/querystring>

<sup>54</sup><https://www.npmjs.com/package/querystring>



The WP3 back-end interacts with the WP4 back-end, from which the former fetches relevant energy data that is particularly relevant for visualization of energy consumption/production and energy consumption signal. The availability of such data through the WP4 platform represents therefore a pre-condition for the ability of the app to correctly visualize such information. The WP3 back-end REST API documentation can be found at <http://civis.tbm.tudelft.nl/apidoc/>.

## 4 User Registration Process

In general, a user can sign up for a YouPower account at the application's welcome page<sup>55</sup>. In this case, the user can use the Action Suggestion part of the application. For the Housing Cooperative part or the Energy Awareness part of the application, more specific user (and energy) information is needed by the application. There are tailored solutions for the Swedish and the Italian test sites respectively which are presented in the following two subsections.

### 4.1 Swedish Test Site

For the Swedish test site users, the registration process depends on the type of user (household member or energy manager) and for household users if their energy data is managed by the cooperative or not (affecting mainly step 2 below). The users register as follows:

1. A household user receives a flyer with information about the app and a URL (also provided as a QR code) that is housing-cooperative-specific, i.e. the housing cooperative which the user belongs to.

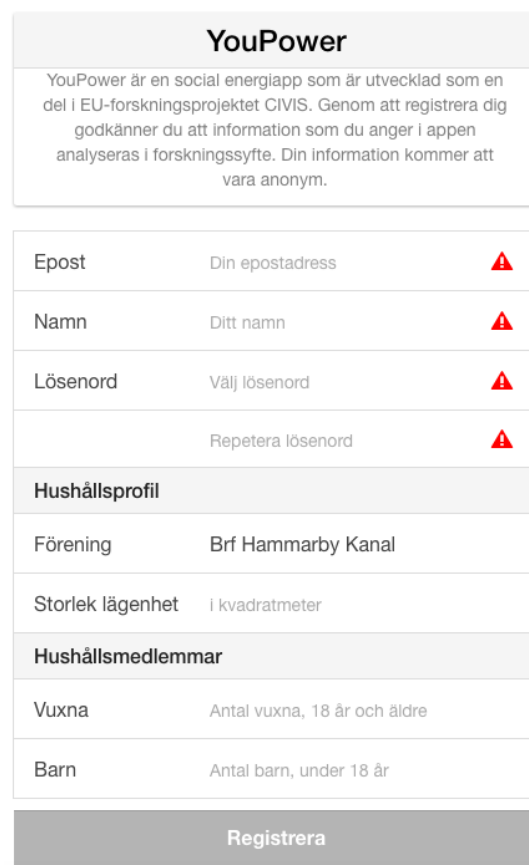
The URL location is managed by KTH (i.e. it is a local Swedish URL) in the format of <http://civis.proj.kth.se/{unique-link-of-a-housing-cooperative}>. Energy managers receive the same URL for their housing cooperative but via email.

2. For housing cooperatives that manage their own apartment level energy data (i.e. own the apartment level energy meters), the user is provided with a unique code on the flyer that they enter to link their account to the household energy data. Users from housing cooperatives that do not own the apartment level energy meters are asked to enter information from their energy bill, and the flyer specifies where on the bill they can find that information. Energy managers similarly provide information from the housing cooperative energy bill to create housing cooperative level accounts.
3. On the sign-up page (see Figure 18), the user is asked to fill in email address, name and password to create an account (compulsory information). It is also possible to

---

<sup>55</sup><https://app.civisproject.eu/frontend.html>

add household information (optional) about the size of the apartment and number of adults (18 years and above) and children (below 18 years) in the household. The name of the housing cooperative is prefilled. For energy managers, household information is only needed in the cases where the housing cooperatives also have household accounts (at present only applicable for two housing cooperatives).



YouPower		
YouPower är en social energiapp som är utvecklad som en del i EU-forskningsprojektet CIVIS. Genom att registrera dig godkänner du att information som du anger i appen analyseras i forskningssyfte. Din information kommer att vara anonym.		
Epost	Din epostadress	⚠
Namn	Ditt namn	⚠
Lösenord	Välj lösenord	⚠
	Repetera lösenord	⚠
Hushållsprofil		
Förening	Brf Hammarby Kanal	
Storlek lägenhet	i kvadratmeter	
Hushållsmedlemmar		
Vuxna	Antal vuxna, 18 år och äldre	
Barn	Antal barn, under 18 år	
Registrera		

Figure 18: Sign-up page Swedish test site.

4. By creating an account, the user consents to CIVIS using the data in the app for research purposes. After completing the form, the user is directed to the YouPower app. Energy managers are given editing rights and can choose to add an email address to the energy contact person in the cooperative, update information about the cooperative (number of apartments, type of ventilation etc.) and add energy reduction actions that the cooperative has taken.
5. The flyer recommends the user to use the webapp on a mobile phone and it also gives instructions for how to create a link to the app on the phone's home screen.





## 4.2 Italian Test Site

New Trentino users should follow a 2-step process to sign up YouPower to use the *Energy Data* features.

1. A user can sign up at YouPower welcome page<sup>56</sup> by filling basic user information such as user name and email address in the sign-up page(see Figure 19-1). The user automatically logs into YouPower after successful registration.
2. In order to access the functionalities discussed in Sec. 2.3.3, Italian users should provide a valid *ContractID* and *TestbedID* in the app *Settings* page (see Figure 19-2). The *ContractID* will be matched to an *ApartmentID* of the household to access the energy data from the back-end while the testbed location will be used to fetch community related information like ToU signals in the municipality and total consumption of the test site.

After this step, the *Energy Data* tab of YouPower will be activated for Italian users.

## 5 Application Management and Setup

### 5.1 Package Management

A package management system or, simply, a package manager is a collection of software tools that automates the process of installing, upgrading, configuring, and removing software packages in an easier and comprehensive manner. The package management in WP3 YouPower development uses state of the art technologies as follows:

- Npm<sup>57</sup>, a package manager for JS, and the default package manager for the JS runtime environment Node.js<sup>58</sup>.
- Bower<sup>59</sup>, a package manager for the front-end development to keep track of and update the packages.
- Gulp<sup>60</sup>, a toolkit that helps to automate tasks in the development work-flow.

<sup>56</sup><https://app.civisproject.eu/frontend.html>




<sup>57</sup><https://www.npmjs.com/>

<sup>58</sup><https://nodejs.org/>

<sup>59</sup><http://bower.io/>

<sup>60</sup><http://gulpjs.com/>

## YouPower









YouPower è una social app incentrata su tematiche energetiche sviluppata all'interno del progetto europeo CIVIS. Registrandoti accetti che i dati che condividerai verranno analizzati ulteriormente all'interno della ricerca. I tuoi dati saranno sempre trattati in forma anonima.

Email	Il tuo indirizzo mail	⚠
Nome	Il tuo nome	⚠
Password	Scegli una password	⚠
	Riscrivi la password	⚠
Scegli la lingua	Italiano	▼

**Registrati**

## Profilo Personale



Nome	
Soprannome	Scegli un soprannome
Num. ID (per utenti CEIS/CEdiS)	0000
Sperimentale (per utenti CEIS/CEdiS)	▼CEdiS
Genere	▼
Compleanno	10-Apr-2016
Scegli la lingua	Italiano

Figure 19: (1) Sign-up page for Italian test site (2) Settings page for Italian test site users.

## 5.2 Localhost Setup

For development of the application, one can set up and start a localhost as follows:

- First install Node.js<sup>61</sup>, Npm<sup>62</sup>, Gulp<sup>63</sup>, GraphicsMagick<sup>64</sup> and MongoDB<sup>65</sup> on the local machine if any of those are not already installed.
- Optional: install Git<sup>66</sup> for version control.
- Clone/import the (front-end and back-end) source code from the GitHub repository<sup>67</sup> to the local machine. The source has a file structure as shown in Figure 20.
- Navigate to the project root directory *YouPower* (or another directory name chosen for the source location) on the local machine and install dependencies:

---

```
cd YouPower  
npm install
```

---

- Start MongoDB. The MongoDB installation and start process/commands are different on Linux/OSx/Windows machines. Please refer to the MongoDB manual<sup>68</sup> for details.
- Start back-end server (1) with Npm start:

---

```
npm start
```

---

or (2) with Gulp:

---

```
gulp
```

---

When running the back-end with gulp, the back-end is restarted automatically each time when there is any change in \*.js files.

- The REST API documentation is generated from inline code comments following the JSDoc specification<sup>69</sup>. The documentation web page is generated/updated with:

---

<sup>61</sup><https://nodejs.org/>

<sup>62</sup><https://www.npmjs.com/>

<sup>63</sup><http://gulpjs.com/>

<sup>64</sup><http://www.graphicsmagick.org/>

<sup>65</sup><https://www.mongodb.com/>

<sup>66</sup><https://git-scm.com/>

<sup>67</sup><https://github.com/CIVIS-project/YouPower>

<sup>68</sup><https://docs.mongodb.com/manual/installation/#tutorials>

<sup>69</sup><http://apidocjs.com/>

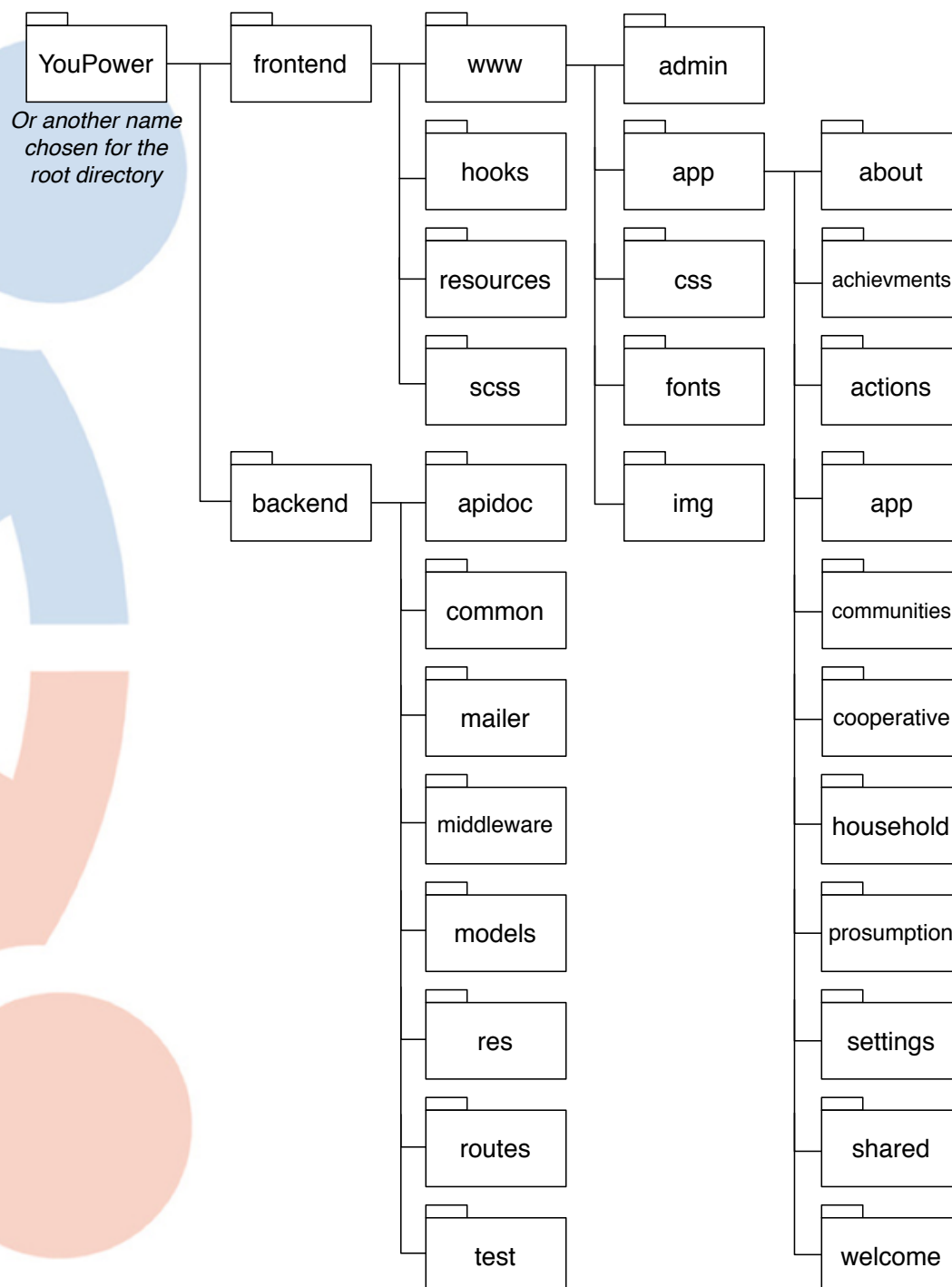


Figure 20: YouPower source code file structure

---

```
gulp apidoc
```

---

The API documentation is then accessible at <http://localhost:3000>.

- Navigate to the front-end directory *YouPower/frontend*:

---

```
cd frontend
```

---

- Install, build and start front-end server:

---

```
npm install -g bower cordova ionic    // install tools for build
npm install                          // install build dependencies
bower install                        // install front-end
dependencies
gulp                                // build front-end
ionic serve                         // start front-end server
```

---

The front-end is then accessible at <http://localhost:8100>.

### 5.3 Production Server Setup

At the Linux production server<sup>70</sup>, WP3 uses *Nginx*<sup>71</sup> as the http and reverse proxy server. To set up Nginx, log on to the server machine and do the following steps:

- Install Nginx if not already installed:

---

```
sudo apt-get remove apache2    // remove the installed server e.g.
apache
sudo apt-get install nginx
```

---

- Configure the reverse proxy rule by editing the file (e.g. on Debian/Ubuntu) :  
/etc/nginx/sites-enabled/default  
Add the following block in the file under the default location / {...} block:

---

```
location /api {
    proxy_pass    http://localhost:3000;
}
```

---

---

<sup>70</sup><http://civis.tbm.tudelft.nl>

<sup>71</sup><https://nginx.org/en/>



This will proxy any requests beginning with `http://{hostname}/api` to the backend service running at port 3000. A similar block can be added for location `/apidoc` to expose the API documentation to the public.

---

```
location /apidoc {  
    proxy_pass    http://localhost:3000;  
}
```

---

The configuration file of the WP3 server can be found at GitHub<sup>72</sup>. For more details about the configuration, refer to Nginx website<sup>73</sup>.

- Change the root line in `/etc/nginx/sites-enabled/default` to the following:

---

```
root /var/www/html;
```

---

- Finally, restart the Nginx service to make all changes take effect:

---

```
sudo service nginx restart
```

---

Nginx should then show a default page, and should proxy API requests to the back-end.

To set up the YouPower back-end on the production server, you can do the following steps:

- Install the dependencies:

---

```
sudo apt-get install nodejs npm graphicsmagick git mongodb tmux
```

---

- Create a symbolic link to the Node location:

---

```
sudo ln -s /usr/bin/nodejs /usr/bin/node
```

---

- It is preferable to do the next steps as a unprivileged user. On the TU Delft server we use user *youpower*. In the following, we will use this username (and home directory) where needed.

---

```
sudo su youpower                                // change to the unprivileged  
user                                             user  
cd                                              // move to the home directory
```

---

<sup>72</sup><https://github.com/CIVIS-project/YouPower-configs/blob/master/etc/nginx/sites-enabled/default>

<sup>73</sup><https://nginx.org/en/>



- Clone the (front-end and back-end) source code from the GitHub repository to the home directory, and install the dependencies:

---

```
git clone https://github.com/CIVIS-project/YouPower/  
cd ~/YouPower  
npm install
```

---

Test running the back-end (it should stay running if everything works):

---

```
npm start
```

---

- To run the back-end as a Ubuntu update service, create a file (/etc/init/youpower.conf) as follows<sup>74</sup>:

---

```
description "YouPower backend"  
author "CIVIS Project"  
  
# When to start the service  
start on runlevel [2345]  
  
# When to stop the service  
stop on runlevel [016]  
  
# run as unprivileged user  
setuid youpower  
  
env HOME=/home/youpower  
env FACEBOOK_APP_ID=<replaceme>  
env FACEBOOK_APP_SECRET=<replaceme>  
env FACEBOOK_CALLBACK_URL=<replaceme, e.g.  
    https://app.civisproject.eu>  
  
# Automatically restart process after crashed  
respawn  
  
# Start the process  
exec /usr/bin/nodejs /home/youpower/YouPower/backend/app.js
```

---

Note: YouPower has Facebook login and share features which require permissions from Facebook. A registered application with *Facebook Developers*<sup>75</sup> obtains an App

---

<sup>74</sup><https://github.com/CIVIS-project/YouPower-configs/blob/master/etc/init/youpower.conf>

<sup>75</sup><https://developers.facebook.com>

ID and an App Secret from Facebook, and can request for different types of permissions to access Facebook user data. This process is well documented on <https://developers.facebook.com>. If the Facebook features are used during development on the localhost, the App ID and an App Secret are needed by the localhost as well.

- Start the back-end with:

---

```
sudo service youpower start
```

---

- To update a running back-end instance:

---

```
sudo su youpower          // change to the youpower user
cd ~/YouPower             // make sure you are in the correct directory
git pull                  // update to the latest master
gulp apidoc               // update the apidocs
sudo service youpower restart // restart the back-end
```

---

If the back-end doesn't start, find the upstart logs in:

---

```
sudo tail -n30 /var/log/upstart/youpower.log
```

---

To set up the YouPower front-end on the production server, you can do the following steps:

- Clone the source code from the GitHub repository to the home directory if it is not updated:

---

```
git clone https://github.com/CIVIS-project/YouPower/
```

---

- Navigate to the front-end directory, install and build the front-end:

---

```
cd ~/YouPower/frontend
sudo npm install -g bower cordova ionic gulp // install tools for
build
npm install                        // install build dependencies
bower install                      // install clientside
dependencies
gulp                              // build front-end
```

---

The built front-end should be in ~/YouPower/frontend/www.

- Create a symlink to index.html called frontend.html:

---

```
cd ~/YouPower/frontend/www  
ln -s index.html frontend.html
```

---

This is needed because there is already an `index.html` on the web server, serving a web page of the YouPower project. In the next step, we configure Nginx to try the frontend directory as a fallback for missing files, and this wouldn't work if there are two `index.html` files.

- To make the frontend available to users, we configure Nginx to use this directory for missing files in the default path. Edit the file<sup>76</sup> `/etc/nginx/sites-enabled/default`: change the default location's configuration block `location / {...}` by replacing

---

```
try_files $uri $uri/ =404;
```

---

with

---

```
try_files $uri $uri/ @frontend;
```

---

and add a `@frontend` block which looks as follows (please change the root path according to where the frontend directory is located):

---

```
location @frontend {  
    root /home/youpower/YouPower/frontend/www;  
    try_files $uri $uri/ =404;  
}
```

---

So we end up with:

---

```
location / {  
    try_files $uri $uri/ @frontend;  
}  
  
location @frontend {  
    root /home/youpower/YouPower/frontend/www;  
    try_files $uri $uri/ =404;  
}
```

---

- Restart Nginx server to reload the configuration:

---

```
sudo service nginx restart
```

---

---

<sup>76</sup><https://github.com/CIVIS-project/YouPower-configs/blob/master/etc/nginx/sites-enabled/default>

- To update the front-end:

---

```
sudo su youpower          // change to the correct user
cd ~/YouPower/frontend
git pull
npm install               // install missing build dependencies
bower install            // install missing clientside dependencies
gulp                     // rebuild frontend
```

---

## 6 WP3 Tasks: Summary of Contribution

### 6.1 T3.1 Community Management

Task 3.1 works in close cooperation with WP5 to explore community management, which is reflected in the diverse CIVIS platform design supporting social sharing, housing cooperative activities in the Swedish test site and the two local consortia in the Italian test site respectively tailored to the local context. Sec. 2.3 discussed the design in detail, which includes:

- The design of YouPower supports housing cooperatives in energy management and more specifically in taking cooperative energy reduction actions. It also allows comparison between cooperatives based on each cooperative's energy performance.
- The design of YouPower facilitates the engagement of all household members for pro-environmental energy actions.
- The openness of energy data (with user permission) and the comparative visualization at community level is key to facilitate users in sharing experience for taking energy reduction and load-shifting actions collectively.
- The design of YouPower provides features that support social sharing and knowledge exchange, and use social norms and public commitment to promote environmental energy actions.
- The design of YouPower supports intrinsic motivations as well as active and volitional forms of extrinsic motivation such as environmental values and social belongingness and relatedness.

### 6.2 T3.2 Energy Consumer Profiling

This task was carried out between the last quarter of 2014 and the first quarter of 2015. The goal was to provide a method to process individual electricity consumption data in order

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to define a set of features that can characterize the behavioral patterns of each consumer, and a way to group similar consumers together. The features extracted from individual consumers' data serve the purpose of describing distinguishing patterns of consumption. Examples thereof are average daily consumption, peak consumption, average daily peak hour, average peak day, and so on. In this way each consumer is characterized by a set of measurements derived from its consumption data. Next, a method to group together users that are similar with respect to the extracted features is constructed. The process devised can be summarized as follows:

1. Energy data is provided in XML format in the green button standard.
2. Energy data is stored into a MongoDB database.
3. The data is cleaned. In particular, missing data are detected and, where possible, interpolated. Outliers are detected and substituted with interpolated data. Outlier detection and management is a standard procedure in data pre-processing. As outliers can easily distort measurements, it has been decided to substitute them with interpolated data. A report with all the modifications performed on data is produced.
4. Features are extracted from each individual energy consumption dataset. Examples of such features are: average daily consumption, average hourly consumption, peak consumption, peak hour consumption, total daily consumption. Each electric energy consumption time series is mapped to a tuple of such features and stored in a MongoDB database.
5. Features tuples are clustered into similar groups. A range of algorithms are provided. These algorithms are available in the scientific computing package *scikit-learn*<sup>77</sup>. Examples of those algorithms are K-means, hierarchical clustering, affinity propagation, spectral clustering, DB scan.
6. A set of metrics to evaluate the goodness of the achieved clustering is provided. These metrics are implemented by scikit-learn. Examples of those are DBI (Davies-Bouldin Index), CDI (Cluster Dispersion Indicator), MDI (Modified Dunn Index), MSE (Mean Squared Error).

The software is written in Python and it is available at the GitHub repository<sup>78</sup>.

Note: after discussing with the CIVIS partners, we agreed that given the test site context of CIVIS, the consumption profiling part was not a most promising path towards load-shifting. Hence, although significant work has been done in this direction, we did not integrate this contribution to the YouPower application. (Nonetheless this contribution can

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<sup>77</sup><http://scikit-learn.org>

<sup>78</sup>[https://github.com/CIVIS-project/Consumer\\_profiling](https://github.com/CIVIS-project/Consumer_profiling)



still be useful for others.) Instead, we devoted extra time and effort for the design and development of an energy production forecasting system, Sec. 2.3.3, which can have a strong impact to help users achieve the load-shifting goals.

### 6.3 T3.3 Interface with System Level

The task 3.3 of CIVIS WP3 took care of exploring the different models for interconnecting the system level developed in WP4, the Energy ICT Platform, with the user level subsystem developed in WP3.

This work, performed between T02 and T08 of CIVIS project, was strictly in connection with the one performed in D4.3, where the interconnection of the two subsystems has been implemented and has been documented in D4.1, where the different models of interconnection have been described.

Sec. 8.3 of CIVIS D4.1 contains the descriptions of three different models that could be used in order to implement the connection between User Level and System Level:

- Solution 1: single connection and native HiReply MS SQL DB (Sec. 8.3.1 of D4.1);
- Solution 2: single connection and use of a remote DB (Sec. 8.3.2 of D4.1);
- Solution 3: double connection and use of a remote DB (Sec. 8.3.3 of D4.1).

Sec. 8.3 of D4.1 also describes the different features, in terms of scalability, that the three solutions can provide. For the deployment of CIVIS ICT Platform we adopted Solution 1, because it was suitable for achieving all the fixed goals in the provided project time frame and that is represented in Figure 21.

The usage of a SQL database, already integrated into the HiReply Platform, simplified the configuration and maintenance operations associated to the system database, without presenting those problems that could be present in large pilot site deployments with SQL technologies. The solution 1 foresaw only one communication channel between user and system level architectures. For this reason the interface developed in WP4 reflects this schema and implements all the communication APIs on the same server. The implemented APIs, documented in Sec. 5.9 of D4.3 v2.0, provide the possibility to retrieve, from the Energy ICT Platform developed in WP4, the following information:

- Energy data coming from DSOs and CIVIS additional sensors, provided in GreenButton format, suitably extended for introducing some parameters useful for CIVIS applications;
- Non-energy information such as the list of all usage points monitored in the system, weather info, the list of the recognized events associated to a usage point in a certain period, etc.

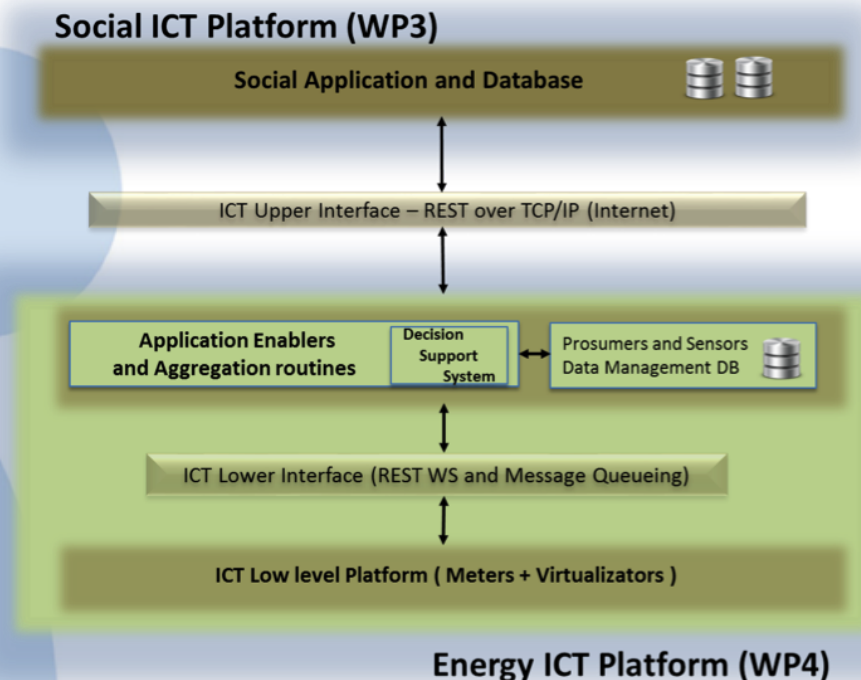


Figure 21: Solution 1 implemented in the CIVIS deployment

## 6.4 T3.4 Energy Service Context

This section highlights the lessons learned of business models for emerging social energy initiatives. In its final deliverable (D6.3) WP6 concludes with four main types of business models that can be applied to the CIVIS maturity scheme (depicting the development from emerging and promising to established energy initiative).

- **Efficiency Effects:** becoming better at what you're doing - activities that enhance brand awareness and increase customer engagement.
- **Diversification:** introducing products and services that are different that the initial domain of the organisation – for (indirect) social as well as (longer term) financial benefits.
- **Service Provisioning:** facilitating others with available expertise – providing available services at marginal costs to others.
- **Incubation:** enabling innovation outside the organisation – high(er) risk investment in the hope to achieve a financial or technical return on investment.



Regardless of the specific maturity stage an organisation stage has achieved, of these four business model types, trying to achieve efficiency effects is one that is most applicable to any maturity stage. To that effect, the mobile energy app that has been developed as part of this work package can be placed in this category. It is an example of activities that enhance brand awareness and increase customer engagement in order to either make the members of the cooperatives more energy aware (and efficient) or that it convinces more inhabitants to join the cooperative.

As such, these developments are (when introduced in the right way) powerful tools that can strengthen a chosen business model. In work package 6 much attention has been given to a step-by-step approach for (emerging) energy initiatives and particularly the use of tooling such as the business model canvas (bmc). The developed tools in WP3 provides a solution for cooperatives to properly address their (mobile and online) members – in other words, describing the “channel” element of the bmc.

Examples of this have become apparent in surveys with the board members of the test-sites in Sweden and Italy. What CIVIS learned is that there is a distinct advantage in having a collaboration or information application available to the cooperative members. While it does not come as a surprise that providing members with information on energy generation, consumption and saving does increase awareness, it is the extent of the impact on awareness that interests us.

While initial uptake of the CIVIS apps has been slow, once people started to use it the awareness of what is happening within the cooperative as a whole is certainly increasing. Throughout the past months, several board members have noticed increased feedback from members since making the mobile apps available. For leadership, this kind of feedback and interaction is particularly helpful in terms of gauging if certain initiatives have a positive effect within the cooperation. In a sense this contributes more to their understanding than just looking at the amount of website “hits” that are available through the IT responsible department or person.

## 7 Conclusion

The main activities of WP3 in the 3rd year of the CIVIS project were carried out to continue and complete the design and development of the CIVIS platform, called YouPower, to meet the project goal and to suit the context and objective of the test sites’ use cases. We continued the adaptive agile development process, and expanded upon the results from the 2nd year of the CIVIS project. The design of YouPower is composed of a set of features that can be divided into three interrelated parts:

1. Action suggestions, where users are provided with suggestions of actions that are implementable in everyday household practices. Users are presented with motivators for behavior change (and its process), and means for self-monitoring, self-reflection



and social sharing of the pro-environmental behavior change process at individual, household and community levels.

2. Housing cooperatives, where energy management and cooperative energy reduction actions are linked to each cooperative's energy performance (and building level energy information). YouPower allows comparison between housing cooperatives based on the energy performance and actions, and supports knowledge exchange and social sharing and learning among cooperatives in energy reduction actions.
3. Energy awareness, where users are presented with real time and historical energy consumption and production information at individual and comparative (community) level, and are provided with time-of-use signals based on real time and forecasted information about local production from renewable sources and the corresponding energy demand in order to enable load-shifting actions in everyday practice.

Along the design of those features, we developed ten design guidelines that address a number of design issues emerged from the CIVIS YouPower project. These guidelines are based on literature about pro-environmental intervention and social and environmental psychology combined with our design experience, and can be useful for the design of other energy community and applications for pro-environmental interventions.

The CIVIS YouPower platform is deployed at the Stockholm (Sweden) and Trento (Italy) test sites: the first deployment at the Stockholm test site was in Nov 2015 and Trento test site in Mar 2016 correspondingly, and since then the production server had been updated once there were new parts ready for deployment. WP3 uses two ways to monitor YouPower user activities: (1) the API calls to the WP3 CIVIS server are logged into WP3 YouPower database; (2) the important user actions (i.e., user clicks) in the YouPower app are logged through *MixPanel*<sup>79</sup>. During the 2nd year's CIVIS review meeting in Brussels, the CIVIS project team committed to the YouPower data collection (keep the servers running) for 6 months after the end of the project. This commitment will be carried out by WP3.

In principle, any interested users (also those outside of the test sites) can sign up the YouPower application. The Action Suggestion part of the application is ready to be used as-is. The Housing Cooperative part is applicable to energy management works of housing cooperatives/associations that exist in a number of EU and non EU countries. The cooperative energy performance feature requires energy consumption data at cooperative level. The Energy Awareness part of the application requires access to users household energy consumption and production (if applicable) data. At the CIVIS test sites, the required energy data at cooperative, household and individual appliance levels are collected by smart meters and smart plugs/sensors. The details about energy data accessibility often differ from case to case, hence requires some adaptation.

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<sup>79</sup><https://mixpanel.com/>





As stated in an earlier deliverable, designing well is not easy (?): if a product is truly new, it is unlikely that anyone will know how to design it right at the first time. The design and development of YouPower together with user studies at the Swedish and Italian test sites by the CIVIS project formed a good basis for and provided valuable insights into the social dimension of the energy network to achieve sustainable energy goals. This is a first step towards long-term sustainable socio-technical development. CIVIS partners are looking for opportunities, i.e. new research projects, to bring the result of this project into further steps. The CIVIS project has its results and the source of the YouPower application open to the public, which may bring future endeavors of interested communities to explore and expand upon the current effort towards promoting sustainable social energy actions.





## References

