Smart Energy GB Stakeholder Consultation Events
A summary report prepared by BritainThinks for Smart Energy GB

December 2014
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Foreword

Dear Colleagues,

My heartfelt thanks to you all for contributing to the workshops we held over the past two months. We had the privilege of working with more than one hundred expert stakeholders in five cities around Great Britain, and each of you has made valuable and unique contributions to our thinking.

We heard good, practical advice on how we should work with partner organisations around the country, including on the assets, resources and assistance that trusted third party organisations will need in order to be fully involved with this national transformation of the way we all buy our gas and electricity.

We also explored the different communications needs of the communities and people that you support and developed our work on identifying the many and varied audiences across the UK who may need additional support to engage with smart meters and the rollout.

Your views have helped us to shape both Smart Energy GB’s Consumer Engagement Plan for 2015, and our Partnership Approach which we will be working to implement through 2015 and beyond.

Thank you again for your time and advice. I hope to work with you throughout the smart meter rollout to make sure nobody misses out on the benefits of smart meters.

Best wishes,

Gavin Sheppard

Director of Marketing

Smart Energy GB

December 2014
With thanks to all those who participated...

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Introduction

Smart meters and the rollout programme

Smart meters are an exciting innovation which will **transform how we buy gas and electricity**. They provide consumers with real-time information on gas and electricity usage in pounds and pence, accurate bills and will give consumers more control over their gas and electricity use.

The smart meter rollout is an **essential technology upgrade**, unprecedented in its scale, to improve our nations' energy infrastructure. Between now and 2020, every home across Wales, Scotland and England will be offered a smart meter.

As well as national benefits, such as laying the foundation for Great Britain’s move to a lower carbon economy and a secure energy supply, smart meters will bring numerous benefits to consumers, including:

- Consumers will be able to see the cost of their gas and electricity usage in pounds and pence and in real time, providing them with control over their usage
- Energy companies will receive up to date meter readings, thus putting an end to estimated bills as well as enabling them to know when a household is cut off
- Prepay top up will become as easy as pay-as-you-go, with a number of different payment options
- Consumers will be able to switch confidently between suppliers and tariffs using accurate data on their consumption to find the best deal
- There will be estimated cost savings of £6.2bn by 2020 which will be passed back to consumers

Who is involved in the rollout of smart meters?

There are a number of organisations involved in the delivery of the smart meter programme. The Department of Energy & Climate Change is responsible for the policy and together with Ofgem agrees suppliers’ annual plans and specifications; Smart Energy GB (and its partners) is responsible for the consumer engagement campaign; and the energy suppliers are responsible for installing smart meters and providing training on smart meters and energy saving advice at the point of installation.

**Smart Energy GB’s legal objectives**

1. Building consumer confidence in the installation of Smart Metering Systems by gas and electricity suppliers;
2. Building consumer awareness and understanding of the use of Smart Metering systems (and the information obtained through them);

3. Increasing the willingness of Energy Consumers to use Smart Metering Systems to change their behaviour so as to enable them to reduce their consumption of energy; and

4. Assisting consumers with low incomes or prepayment meters, or consumers who may encounter additional barriers in being able to realise the benefits of Smart Metering Systems due to their particular circumstances or characteristics, to realise the benefits of Smart Metering Systems while continuing to maintain an adequate level of warmth and to meet their other energy needs.

**Smart Energy GB’s progress in 2014**

Smart Energy GB has:

- Continued its programme of qualitative and quantitative consumer research, including audience segmentation and mapping
- Raised the profile of smart meters through activity across print, broadcast and online media
- Created and launched a public-facing website
- Consulted with consumer groups, charities, MPs, councillors and community representatives
- Begun creative development of the core campaign
- Launched the first round of public advertising
- Developed its model for partnerships

**Objectives of the stakeholder consultation workshops**

As part of the development of the Consumer Engagement Plan, alongside consumer research and dialogue with individual experts, Smart Energy GB (then still the Smart Meter Central Delivery Body) initiated a series of stakeholder workshops across Great Britain in November 2013. These workshops had a broad focus and identified five key principles of consumer engagement, which informed the Consumer Engagement Plan.

Smart Energy GB has continued to build its programme of stakeholder consultation in 2014. This series of workshops was intended to:

- Refine Smart Energy GB’s existing segmentation of hard to reach audiences
- Supplement its understanding of any extra support these audiences might need on their journey to successful usage of smart meters
• Learn lessons of successful partnerships in consumer engagement campaigns, as well as understand the specific requirements of potential partners

• Inform the update to Smart Energy GB’s Consumer Engagement Plan
Methodology

BritainThinks were commissioned by Smart Energy GB to design, organise, facilitate and report on the stakeholder workshops. Events were organised by BritainThinks in five locations:

- Glasgow (29th October)
- Cardiff (17th November)
- Newcastle (19th November)
- Exeter (21st November)
- London (24th November)

Invitations to participate in the workshops were sent to a large variety of different organisations, including a combination of Smart Energy GB’s stakeholders and partners. Participating organisations had expertise in either the needs, concerns and priorities of different consumer groups, the relationship between consumers and energy, or in engaging with consumers.

The agenda for the workshops included an introductory presentation by Smart Energy GB, a Q&A session, and several group exercises. These exercises, as well as more general discussion in plenary sessions and wider feedback received separately from participating stakeholders, generated several key consumer engagement insights. A summary of these insights forms the basis for the remainder of the report.
Key Consumer Engagement Insights

General advice for the campaign

The positive overall vision of the smart meter rollout campaign should be clearly expressed

- Stakeholders would like to see Smart Energy GB tell the story of the smart meter rollout’s role within the nationwide infrastructure upgrade
- The campaign’s role within the national narrative of reducing energy consumption should also be clearly expressed, as well as its connections to wider movements (e.g. the ‘green’ or ‘smart/technological’ agendas)
- Stakeholders believe that validating the rollout in this way would build consumers’ trust in smart meters

Over and above this national story, the additional individual consumer benefits need to be clearly set out

- Stakeholders believe that it will be important to let consumers know that smart meters will provide them with control over their energy bills, and what this will mean for them in practice
- Stakeholders also pointed out the importance of being clear, for example, letting individuals know exactly how great a financial saving they can expect to receive

It will also be important to reassure consumers (and partners) about possible concerns raised in the consultation

- The potential for confusion amongst consumers about the installation process should be addressed in advance. For example, in the case of rented accommodation, tenants will need information about whether they or their landlords have responsibility for consenting to and organising installation
- Stakeholders pointed to other potential concerns to be addressed, including fears amongst consumers relating to data security, as well as mitigating the possibilities of ‘dangerous’ behaviour change (e.g. households minimising energy use to save money as a result of being able to see their energy costs at any given time on their in-home display)
Identifying potentially vulnerable audiences

Reviewing Smart Energy GB’s existing segmentation of potentially vulnerable audiences, stakeholders refined some of the categories and suggested a range of groups that could be added, including:

- Transient groups who may lack motivation to have smart meters installed in temporary accommodation (e.g. students, armed forces, travelling communities)
- ‘Younger’ older people (i.e. those aged 55-75) who may face many of the same barriers to those aged 75+
- Carers, especially young carers, who might operate outside of established support groups
- People with drug or alcohol issues
- Groups that are ‘hard-to-reach’ but not ‘vulnerable’ (e.g. people with second homes or spend a lot of time abroad, young families who may lead busy or chaotic lives)

“Students are a good audience to target as, if engaged, you will have a person who will get a smart meter in subsequent properties. Very mobile and transitory with strong links and influence over other students and parents.”

In addition, stakeholders pointed out a number of complexities when identifying potentially vulnerable audiences

- Many of those with obvious vulnerabilities will already have established and trusted support networks/channels. This means that many organisations have existing lists of hard-to-reach and vulnerable audiences, as well as established channels of communication with them, however this could mean that less ‘obviously vulnerable’ audiences will be in danger of missing out
- Stakeholders reiterated the importance of recognising that these groups are diverse and some people may not be connected to support networks/channels. There are people with vulnerabilities who do not fit the ‘typical’ demographic, e.g. younger deaf people (since deaf support groups tend to be focused on older deaf audiences and younger deaf people can be less well integrated into the deaf community)
- People with multiple vulnerabilities were also identified as further confusing the picture

“All of our clients are in debt. 10-15% will have electricity arrears in excess of £500 and similarly around 16% will have gas arrears. This means they will be very nervous about contact from their energy company.”
Supporting potentially vulnerable audiences

Potentially vulnerable audiences may need additional support at each stage of the consumer journey:

- **Awareness**
- **Saying yes to installation**
- **Energy supplier gets in touch**
- **Usage**

(Stages of the consumer journey)

Stakeholders were allocated a number of pen portraits of potentially vulnerable consumers and considered what additional communications support they would need at each stage of their consumer journey. Below are two examples of completed exercises:

**PEN PORTRAIT EXAMPLE: JUDY**

Judy is 32 and lives in social housing in Cardiff. She is a single mum with a daughter and two sons. Judy receives a number of benefits, but finds it difficult to manage her personal finances; she is applying for a debt relief order. Energy bills are a particular worry.

1. **Awareness**
   - Judy might connect to a national campaign via tv, social media
   - Social landlord might be able to work as a partner and advise
   - Awareness through her children and their schools

2. **Making a decision**
   - Judy will want to know ‘what’s in it for me?’ This will particularly be saving money and gaining control over energy use
   - An additional benefit such as an energy audit (insulation etc)

3. **Saying yes to installation**
   - She will need a full understanding of the process and what to expect from the installation
   - She will also need to be reassured that it is her decision to make and she won’t need the permission of her housing provider

4. **Energy supplier gets in touch**
   - Flexible installation and at least 2/3 weeks notice before installation
   - Work through smart phones/text - if Judy has debt problems she may be nervous answering unknown calls

5. **Usage**
   - Judy needs messages about household budgeting as well as energy efficiency
   - Also health messages to make sure that she doesn’t turn the heating off
A number of overarching principles can be identified from the completed exercises, applying to communications support for all potentially vulnerable consumers.

Across all stages of the consumer journey, stakeholders stressed that communications support should be simple and clear

- This means being informative, but not containing an overload of information
- Stakeholders pointed out that for many of the potentially vulnerable audiences identified in the segmentation, the language will need to be uncomplicated, and the information should also be pictorial wherever possible

“Older people are as diverse as younger people. What works for all is plain English.”

Follow-up communications after installation, at the ‘usage’ stage, are crucial to ensure that consumers use their IHD and new meters effectively

- This means both making energy savings but also managing energy use more effectively (and not reducing consumption to dangerous levels)
- There should also be a single, easily available point of contact for any queries and complaints

The message is as important as the format and source of communications

- Stakeholders were clear on the importance of getting the message right when engaging with potentially vulnerable audiences. This should include:
  - Leading with the benefits of having a smart meter installed
  - Managing expectations (e.g. of the financial savings it could lead to)
  - Ensuring smart meters are used safely
- Another challenge to be addressed is providing reassurance around possible concerns without generating unwarranted fears that didn’t previously exist
• Consider including wider energy advice and financial management advice in order to maximise the beneficial impact of smart meter installation

“People in debt/financial difficulty often have a range of pressing issues to deal with - a smart meter could be well down their priority list so timing, clarity around benefits and follow-up will be important.”

Stakeholders noted the importance of understanding who else is involved in the decision-making process

• Consumers, and particularly vulnerable audiences, rarely make decisions in isolation and many already have established and trusted support networks in place
• When thinking about these trusted intermediaries, parents, friends and neighbours matter as much as formal partner organisations

“Going into schools will be key. It would work really well with the IHD, teaching children how to use it in schools, they would then want their parents to get one. It would also work as a really strong way of showing them that if you turn the lights off the meter goes down straight away, teaching them about energy efficiency.”
Working in partnership

Stakeholders were asked to share examples of previous public engagement campaigns with successful partnerships, and to provide three key lessons for successful partnership working

- Examples included national level campaigns as well as those at the very local level, targeting a specific community

Below are two examples of completed exercises:

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<thead>
<tr>
<th>National example: ‘5-a-day’ campaign</th>
<th>What worked well:</th>
<th>What could have been improved:</th>
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<tr>
<td></td>
<td>Clear and simple message</td>
<td>Targeting groups on low incomes and with low literacy</td>
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<td>Easy concept - visual</td>
<td>Incorporate into education system to reach younger audiences</td>
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<td>Could connect to a diverse range of narratives (obesity, health benefits, school dinner quality)</td>
<td>Help to buy the right foods</td>
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<td>Relevant and inclusive approach to partnerships</td>
<td>More information about portion sizes (i.e. wider information to assist harder to reach audiences)</td>
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<td>Not too prescriptive and gave organisations achievable goals</td>
<td>Evidence of impact beyond mass media</td>
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<td>Used by lots of brands - adaptable</td>
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<td>Engagement of supermarkets/ labeling</td>
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<td>Longevity (takes time to embed)</td>
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<th>Local example: Engaging the Somali community in Bristol</th>
<th>What worked well:</th>
<th>What could have been improved:</th>
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<td></td>
<td>Engaged with local BME groups</td>
<td>More money would have enabled the project to last longer</td>
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<td>Tried to recruit a volunteer but found that having an employee was more effective</td>
<td>Recognise limited availability of volunteer time with small community</td>
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<td></td>
<td>This was a local community member who had the connections to reach a wide audience, and trust</td>
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<td></td>
<td>Writing-off debt got people to engage</td>
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<td>Provide lots of food for partners at meetings</td>
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<td>Flexible approach to time keeping and letting partners dip in and out</td>
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Five key principles for partnership working emerged, with stakeholders stressing that Smart Energy GB should:

1. **Show that you respect your partners’ time**
   - Planning and management will be key to ensuring the delivery of what is promised to partners
• Begin planning and thinking about which organisations to partner with as early as possible. Partners should be diverse and range from being very local to national to ensure the best possible reach of the campaign (particularly to groups that are hard to reach)
• Providing partners with a single point of contact will reassure them and help keep on top of progress and targets

“Give us a key, named contact who can offer assistance/guidance.”

2. Help stakeholder organisations meet their objectives
• The central campaign message needs to be simple and consistent, and it should lead with the main consumer benefits
• It will also be important to allow partners to tailor benefits to make the campaign relevant to their objectives and beneficiaries
• Providing information on how the campaign links to existing narratives will help partners to explain the benefits of the rollout to their beneficiaries. This could include national, widespread messages or enabling partners to integrate campaign messages with their existing campaigns to make it targeted to their specific beneficiaries

“Provide clear messages about the benefits of smart meters for our beneficiaries, including how they can be an aid to budgeting”

3. Keep partners updated
• Share information and developments regularly with partners as they will want to know about the progress of the engagement campaign and what the next stages will be
• Information that is shared with partners must also be transparent, which means sharing any problems with the progress of the campaign as well as successes. This will make partners feel trusted, in the loop, and motivated to push forwards with their own engagement targets as a partner

“Keep us in the loop about the campaign, with regular updates via email (e.g. A newsletter with details on the progress of the campaign, future plans and what we might be able to do to assist).”
4. Understand what partners will need from you
   • Provide partners with materials that they can distribute amongst their beneficiaries. These need to be available in a range of formats to make them easily understood by specific consumer groups
   • If partners are creating handouts for themselves, they will need clear guidelines on branding and formatting to make sure that the campaign is as joined up as possible
   • Stakeholders were also clear on the importance of being open about the opportunities for funding/training as these are resources that smaller organisations will be relying on

   “Provide clear handouts and information that we can give to our clients.”

5. Provide partners with tailored, achievable goals
   • Potential partners will be as varied as the consumer groups that they represent, and so will need specific goals and support
   • Be flexible about the demands that are placed on partners (especially time commitments) - but be clear on expectations and delivery targets

   “Give us time to plan any work you ask us to do as we will be working with a small staff team but have an extensive network of community organisations and activists who we would need to bring on board.”
Appendix

Workshop agenda

All five workshops ran across an afternoon and followed the following agenda:
- The introductory presentation and Q&A session were shorter at the Glasgow workshop and extended for the subsequent events.

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<tr>
<td>1.15pm - 2pm</td>
<td>Introduction and initial questions</td>
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<td>2pm - 2.25pm</td>
<td>Table exercise 1: Develop segmentation of potentially vulnerable audiences</td>
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<td>2.25pm - 3.20pm</td>
<td>Table exercise 2: Identify key considerations for potentially vulnerable audiences with additional communication support needs at each step of their journey</td>
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<td>3.20pm - 3.35pm</td>
<td>Tea &amp; coffee break</td>
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<td>3.35pm - 4.15pm</td>
<td>Table exercise 3: Identify lessons of previous partnership campaigns</td>
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<td>Questions, final comments and key actions going forward</td>
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Slides used at each workshop

Smart Energy GB introduction

The Smart Meter programme
An essential technology upgrade for our energy infrastructure: 50 million new gas and electricity smart meters installed in homes across Great Britain between now and 2020

Benefits:
- Consumers see the cost of their gas & electricity usage in real time
- An end to estimated bills
- Prepay top up becomes as easy as pay-as-you-go
- Power companies know when a household is cut off
- Consumers can switch confidently between suppliers & tariffs using accurate data on their consumption to find the best deal
- The estimated cost savings to be passed back to consumers by 2030 are £6.2bn
Delivering the smart meter program

DECC is responsible for the policy. It agrees suppliers annual plans and specifications.

Smart Energy GB raises awareness amongst consumers of how smart meters can benefit them.

Partners support awareness raising and behaviour change amongst harder to reach groups.

Energy Suppliers offer smart meters to their customers, install them and provide training.

Smart Energy GB legal objectives

1. Build consumer confidence in the installation of Smart Metering Systems by gas and electricity suppliers;

2. Build consumer awareness and understanding of the use of Smart Metering systems (and the information obtained through them);

3. Increase the willingness of Energy Consumers to use Smart Metering Systems to change their behaviour so as to enable them to reduce their consumption of energy; and

4. Assist consumers with low incomes or prepayment meters, or consumers who may encounter additional barriers in being able to realise the benefits of Smart Metering Systems due to their particular circumstances or characteristics, to realise the benefits of Smart Metering Systems while continuing to maintain an adequate level of warmth and to meet their other energy needs.
The smart meter rollout 2013-2020 (latest published DECC summary)

Progress in 2014

- Publication of Consumer Engagement Plan
- Considerable qualitative and quantitative consumer research
- Audience segmentation & mapping against predicted rollout to inform campaign planning
- Significant improvement in the quantity and levels of positive smart meter media coverage
- Created and launched public facing website
- Consulted with consumer groups, charities, MPs, councillors and community representatives
- Creative development of core campaign
- First round of advertising has gone live
Smart Energy GB approach to partnerships

- Built on best practice models - consultations with experts, delivery agencies, and campaign specialists
- Designed a flexible model which provides a package of support to partners
- Work with a variety of organisations including charities, community groups, social enterprises, public sector organisations and commercial enterprises
- Partners selected on their ability to reach an identified audience and the relationship of trust that they hold with that audience
- No partner will be asked to bear a burden, financial or otherwise, as a result of delivering communications or support as part of our campaign
- First of partner activity to go live summer 2015 in line with the scaling up of the rollout

Develop segmentation of potentially vulnerable audiences

2pm - 2.25pm
Smart Energy GB legal objectives

1. Build consumer confidence in the installation of Smart Metering Systems by gas and electricity suppliers;

2. Build consumer awareness and understanding of the use of Smart Metering systems (and the information obtained through them);

3. Increase the willingness of Energy Consumers to use Smart Metering Systems to change their behaviour so as to enable them to reduce their consumption of energy; and

4. Assist customers with low incomes or prepayment meters, or consumers who may encounter additional barriers to being able to realise the benefits of Smart Metering Systems due to their particular circumstances or characteristics, to realise the benefits of Smart Metering Systems while continuing to maintain an adequate level of warmth to meet their other energy needs.

Work we’ve done this year

1. Deepened our understanding of potentially vulnerable audiences by reviewing existing approaches, definitions and research by:
   - Government (e.g. Department of Energy & Climate Change, DWP, Scottish Government, Welsh Government)
   - Regulator (e.g. Ofcom, Ofgem, SMICoP)
   - Third parties (e.g. Age UK, Consumer Futures, Citizens Advice, Digital UK, National Housing Federation, NEA, ONS, PayPoint, RNIB, UK Power Networks)

2. Extracted audiences which require bespoke activity (in addition to mainstream marketing and communications) e.g. partnerships, bespoke assets/materials and paid media

3. Set out identifiable groups that are potentially vulnerable (allowing us to target and deliver bespoke activity to them)
Identifying key considerations for potentially vulnerable audiences with additional communication support needs at each stage of their journey

2.25pm - 3.20pm

Smart Energy GB and energy suppliers’ respective roles in the consumer journey

- **Awareness**
- **Saying yes to installation**
- **Making a decision**
- **Energy supplier gets in touch**
- **Smart meter installation**
- **Usage**

- Predominantly Smart Energy GB/partner
- Energy supplier (Smart Energy GB is not responsible for installation)
- Smart Energy GB/partner AND energy supplier
Linda

- Linda, 34, is severely sight impaired and lives alone in a housing association supported flat in Swansea
- She claims Personal Independence Payment and is looking for part-time work
- Linda attends a monthly social group for people with visual impairments, but otherwise doesn’t get out much. However, she has a computer with speech software and enjoys going online regularly

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Please outline what additional communications support XXX would need at each step of his journey from awareness of smart meters to successful use. Think about types of support and examples of organisations that might be well placed to deliver it.

1) AWARENESS
   - Consider audio led channels (e.g. radio rather than TV/outdoor print)
   - Consider braille and optimising communications for electronic reader

2) MAKING A DECISION
   - Will consult trusted networks for recommendation on this new technology before seriously considering adoption

3) SAYING YES TO INSTALLATION
   - May see the benefits of a smart meter but be reluctant to say yes because of safety concerns about letting an installer into the home if alone and concerns over accessibility of the technology

4) ENERGY SUPPLIER GETS IN TOUCH/INSTALLATION
   - Energy supplier has an obligation to keep a Priority Services Register and therefore should know of their customer’s visual impairment and be able to offer appropriate information/support upon contacting them. May require additional support preparing home for installation visit (e.g. identifying location of meter box, clearing objects)

5) USAGE
   - IHD design will need to be optimised for blind/ partially sighted person to be able to read and use the data. Use of sonic aids?
   - Usage guides to be made available in braille and for electronic readers
Identifying lessons from previous partnership campaigns
3.35pm - 4.15pm

Smart Energy GB will support partners in three ways:

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<th>Building skills and leaving a legacy</th>
<th>Providing funding</th>
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