Policies and measures to tackle transport and energy poverty

Country views and action-oriented guidance

EPAH Conference

Warsaw, 20.09.2023

Why energy and transport poverty?

Introduction of the ETS2 and Social Climate Fund

"The increase in the price for fossil fuels can disproportionally affect **vulnerable households**, vulnerable micro- enterprises and **vulnerable transport users**"

(1) 'energy poverty' means a household's lack of access to essential energy services that underpin a decent standard of living and health, including adequate warmth, cooling, lighting, and energy to power appliances, in the relevant national context, existing social policy and other relevant policies;

(2) 'transport poverty' means individuals' and households' inability or difficulty to meet the costs of private or public transport, or their lack of or limited access to transport needed for their access to essential socioeconomic services and activities, taking into account the national and spatial context;
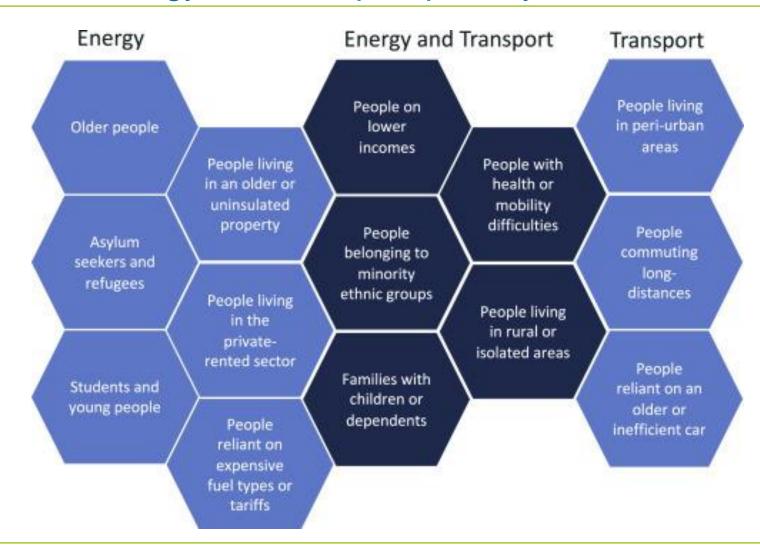
Why energy and transport poverty?

- "Double energy vulnerability" (Simcock et al. 2021)

  - A particularly severe form of energy injustice because it represents a form of compounding disadvantage that has deep structural causes

Groups at risk of energy and transport poverty (Martiskainen et al., 2021)

Why energy and transport poverty?

- "Double energy vulnerability" (Simcock et al. 2021)

  - A particularly severe form of energy injustice because it represents a form of compounding disadvantage that has deep structural causes

- Trade-offs within household budgets between households and mobility-related costs

  - Can become a compounding issue

Where can we identify synergies for effective targeting, implementation, and alleviation?

Todays session

11:00-11:20	11:20-12:00
Lightning Round	**World Café**
Input from Spain, Poland, and Romania	4 x discussion rounds in small groups

Lightning Round

Energy and transport poverty in Spain, Poland, and Romania

Spain: Definitions

- Referred to unaffordability, inaccessibility, time poverty, insecurity...

- Sometimes is defined in economic terms:

  - as if >10% of the citizen income is dedicated to transport

  - If the proportion of income spent is twice the national average

- Others... Inspired in definitions made in other studies. P.e BC3 has a Spanish reference study (based on Lucas et al.) on 5 characteristics to define TP:

  - Not having transport options adapted to physical requirements

  - Not being able to maintain quality of life due to lack of transport

  - Not having a residual income after transport needs have been paid

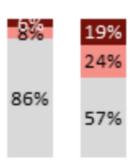 - Time poverty

  - Dangerous, unhealthy of unsafety conditions
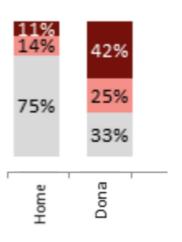
Spain: Data and indicators

- There's data about the infrastructures, the services, Public transport in general

- EMEFsurvey for working days also includes some gender questions

- Time of Use Survey from INE

- Data about income

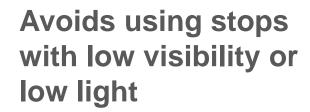- N⁰ passengers using public transport (but not by type...)

Spain: Policies, measures and reflections

- *España 2050* document, encompasses several initiatives for the near future of Spain, to decarbonise mobility industry, by **increasing public transport** offers inside cities, **increasing intermodal rail** public transport, incentivising **carsharing and carpooling**, with the objective to **reduce the use of private cars**, and **increase the interconnection** of public transport, especially in poorer connected areas.

- Spanish *Ley del cambio climático y Transición energética* stablishes that every municipality over 50.000 inhabitants will have Low Emission Zones

- Measures at national level: reduced public transport tariffs, also youth increased until 30 y.o // Rural Mobility table

- Measures at local level (p.e gender issues)

Spain: Reflections

- TP is in the debate, but still not many measures have been taken – No impact seen

- Opportunity to link transport poverty policies with energy transition and climate policies.

- More national and local studies are needed to determine the scope of this social priority (consultation and hearing processes).

Poland: Definitions

The definition of energy poverty was legally established in the Shelter Allowance Act of 17 December 2021. According to Article 5gb(1), **Energy poverty refers to a scenario where a household**, run by one or several persons in a self-contained or single-family dwelling without any economic activity, **is unable to secure adequate heat, cooling and electricity for powering appliances and illumination**.

For a household to meet the qualifying criteria for energy poverty, it must have:

• a low-income status,

• high energy expenditure,

• must reside in a building or dwelling with low energy efficiency.

Neither legal documents nor academic discourse in Poland defines **transport poverty**. Instead, "wykluczenie komunikacyjne / transportowe" - **transport-based social exclusion** or – more common – **transport exclusion**.

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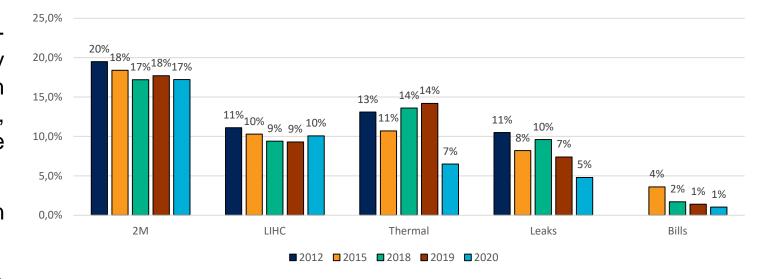# Poland: Indicators of Energy Poverty

2M - households whose energy expenditure as a share of income is more than twice the national median

LIHC (Low Income High Costs) - households whose necessary energy expenditure exceeds the national median and who, after spending this amount, would be left with a residual income below the official poverty line

Thermal - households unable to maintain adequate levels of heat in the dwelling

Leaks - households living in housing with a leaking roof, damp walls, floors or foundation

Bills - households with utility arrears

Poland: Issues with Transport Poverty data

- There is scholarly attention paid to this topic, however, due to lack of data, research is restricted to case studies

- There are few national data sources, GTFS data is only accessible in major metropolitan areas, and for local transport, only commercial connection search engines are available

- Level of transport exclusion have been estimated by NGOs

- Census results will soon be available with more detailed data to estimate transport poverty indicators

Poland: Policies and measures

- **Energy poverty:**

  - Bank of Good Practice: an overview and summary of existing energy poverty instruments and mechanisms, suggestions for improvements to enhance their effectiveness and proposals for the introduction of new legal and policy frameworks and programmes

  - Key instruments: housing allowance, energy allowance for vulnerable consumers, shelter allowance and target subsidy

  - NFOŚiGW's Clean Air priority programme: subsidies for replacing inefficient heat sources and enhancing the energy efficiency of buildings.

- **Transport poverty:**

  - The Polish Ombudsman (Commissioner for Human Rights) identified transport exclusion as a human rights issue and proposed minimum standards.

  - A Government Plenipotentiary for tackling Transport Exclusion and an opposition-led Parliamentary Group for Combating Transport Exclusion were established

  - Bus Transport Development Fund - a nationwide programme to subsidise public transport in non-urban areas with the aim of eliminating transport exclusion zones in Poland.

Poland: Reflections

- Government programmes designed to tackle fuel poverty ought to facilitate greater awareness and knowledge in this field.

- Transport poverty is often overlooked, even by those with a deep interest in the issue of transport exclusion.

- Public transport affordability is a key concern, with accessibility being a problem as well, but availability should be the top priority.

- Although there are connections with climate policy, the current focus remains on the social aspect as energy and transport poverty is prevalent throughout the population regardless of minority status.

Romania: Definitions

Defining energy and transport poverty

Energy Poverty: A complex phenomenon that encompasses vulnerabilities from various areas: low incomes, high-energy prices and low energy efficiency of the buildings. Over these three driving factors, other conditions such as family composition, health issues, access to various fuel types may lead to specific vulnerabilities (ROEP, 2022).
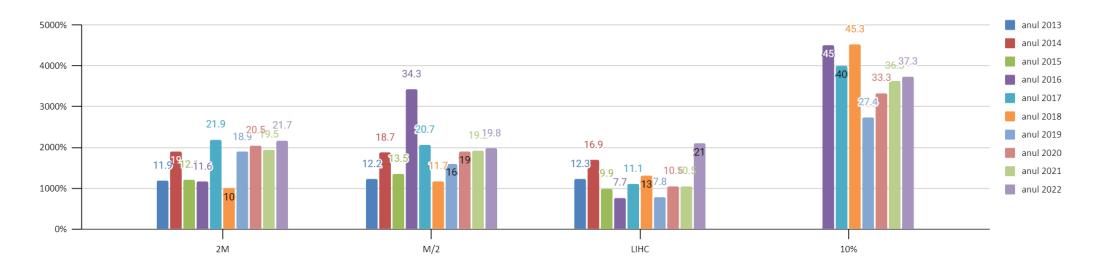
Transport Poverty: there is not a universal definition, however, the phenomenon can be definied through the paradigm of 4A (accessibility, affordability, availability and acceptability.

In Romania, the discussions about transport poverty are still incipient. Energy Poverty has more traction, including a law that addresses the phenomenon.

Romania: Data and indicators

The evolution in time of energy poverty indicators

Analysis conducted on HBS from various years. But there are still missing data and nuances, the state of the building, corellating indicators with the energy efficiency of the buildings, local data about the energy infrastructure, etc

Energy Poverty is still generally understood in terms of income and therefore the measures are designed mainly as financial interventions (heating subsidies and benefits, other financial interventions).

The SCF mai change the paradigm of EP interventions (long-term solutions vs. Immediate band aids).

Transport Poverty Indicators

Mirroring indicators

2M = 42.33%

M/2 = 45.3%

LIHC = 18.15

10% = 13.1%

How can we better measure transport poverty?

Romania: Policies and measures

What policies, measures and or instruments are currently in place to tackle EP and TP?

1. Heating subsidies and energy payments

2. Cap energy prices and compensation mechanisms

3. Non-targeting energy poverty: other cash payments, thermal insulation programmes, changing appliances with new energy efficient ones

4. For transport: municipalities have local authonomy and can subsidize various groups: students, people with various disabilities, pensioners.

5. National policies: subsidies for train tickets for various groups. Train travel in Romania is rarely acceptable and sometimes not even available and accessible.

Romania: Reflections

Access to data – limited; the classic indiators are telling just a part of the story

What data do we need for better undertanding energy and transport poverty?

What needs to happen next?

a. Better data collection

b. Better data integration into national datasets

c. Collaboration among various stakeholders

d. Local and national policies

World Café

Discussing policy design and implementation

What do you need?

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The World Cafe Objective

Thinking about transport and energy poverty holistically, we want to learn from each other to understand from existing implementation policies and practices which actions have created barriers or are lessons for best-practice

- Are current practices useful?

- How do they create opportunities or barriers?

- How could they be improved?

- What should be avoided?

- Who has been the pivotal actor to create positive change?

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The World Cafe format

➤ Are current practices useful? Do they create barriers or opportunities? How could they be improved? What should be avoided? Which actor is the driving force for change?

Topic 1: Implementing action: <u>European and national</u> level	**Topic 2: Implementing action: <u>Local</u> level**	**Topic 3: Best-practice:**
• What are the roles and responsibilities of which **<u>actors</u>**? Who is necessary, who is missing? Who needs what for successful implementation? What guidance and support is provided?	• What are the roles and responsibilities of which **<u>actors</u>**? Who is necessary, who is missing? Who needs what for successful implementation? What guidance and support is provided?	Which specific… • Policies • Measures • Projects • Initiatives
• Which **<u>policies and measures</u>** are necessary/useful/harmful and why? How have these been implemented?	• Which **<u>policies and measures</u>** are necessary/useful/harmful and why? How have these been implemented?	• Mechanisms • Tools • Actors • Ideas
• What **<u>financial</u>** support is given for implementation (and how do you get it!)?	• What **<u>financial</u>** support is given for implementation (and how do you get it!)?	…are pivotal in enabling **<u>best-practice</u>**? …have ended in **<u>worst-practice</u>**?

Tell me ONE interesting thing

Quick feedback round from each group discussion

Thank you for your attention and participation!

Brainstorming will be documented and included in conference documentation