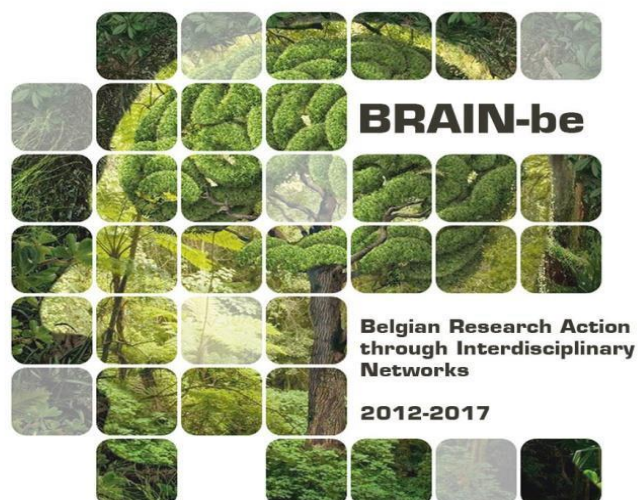




Axis 5: Major societal challenges
Contract: BR/121/A5/2GENDERS
NETWORK PROJECT

Generation and Gender ENergy DEprivation: Realities and Social policies (2GENDERS)

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2. STATE OF THE ART AND OBJECTIVES

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1. STATE OF THE ART

In the past few years, more and more research has been undertaken in the field of 'energy poverty', a phenomenon that was first analysed in the United Kingdom most notably by Brenda Boardman (1991) in her landmark book on fuel poverty. As mentioned by Bouzarovski and Petrova (2015) and Thomson, Snell and Bouzarovski (2017) in their more recent reviews, much research has been devoted to households living in energy poverty in the United Kingdom and in Ireland. Since 2005, energy poverty has at last been recognised as an important stake in continental Europe, both as an academic field of research and as an area for policy intervention.

There are many definitions of this phenomenon (e.g. Boardman 1991: 227; EPEE 2007: 5; EESC 2010:53; DTI (UK) 2001:6; Hills 2011:19; Dubois 2011:111); a review article analyses the definitions used in the United Kingdom and their implications for policy (Moore, 2012). Bouzarovski and Petrova (2015), and Day, Walker and Simcock (2016) have reviewed the numerous definitions of energy poverty. As put by Bartiaux, Vandeschrick, Moezzi and Frogneux (2018: 1220), "[b]oth reviews underline that the term 'fuel poverty' is generally used in Northern (and colder) countries while in less developed countries, the term 'energy poverty' is preferred and encompasses larger issues (e.g. governance, electrification...). But Bouzarovski and Petrova (2015: 37) conclude that their review "hint[s] at the theoretical obsolescence of the notion of 'fuel poverty', even if the concept is widely recognized in policy and scientific circles". They propose instead a concept of "energy service poverty". They argue that, in a given context, energy service poverty is caused by problems of access to infrastructure and affordability depending on the energy mix and its "conversion to 'useful' energy", which in turn raises the issues of efficiency and flexibility. This 'useful' energy provides the households with various energy services (such as space and water heating, cooling, drying and so forth): these energy services are then structured and normalised by norms and needs for energy that shape household final demand (Bouzarovski and Petrova, 2015: 36)".

In Belgium, the first important research on the topic was conducted by Huybrechs, Meyer and Vranken (2011) who defined energy poverty as: "the situation where a person or a household encounters particular difficulties in his/her dwelling to satisfy his/her elementary energy needs" (p.6). For Huybrechs et al. (2011), the causes of energy poverty are manifold: a low income, an energy inefficient home and rising energy prices are among the key factors. These factors are interrelated: people with small budgets often live in energy inefficient homes due to exclusion from the decent housing market (Ceulemans & Verbeeck, 2015). Rising energy prices also have a bigger influence on people with small budgets (Dumortier et al., 2006). The knowledge and some behaviours of people may be other factors, as well as using old, energy consuming electrical appliances or using an expensive energy source (like electrical heating) (Huybrechs et al., 2011). Here too, the relation with income is clear (for example, due to budgetary restrictions, poor people are more likely to have old electrical appliances that are less energy efficient). A strong winter and/or a colder climate zone are other influencing factors, like the fact that some people spend more time at home during the day (e.g. pensioners, unemployed people) (Huybrechs et al., 2011). Furthermore, the energy landscape is very complex, which makes it difficult for people to find their way. Although more and more people switch to a cheaper supplier, many still stay with their traditional supplier, even if this supplier has less favourable tariffs. (See for example Middlemiss & Gillard, 2015.)

Energy poverty is a cause of great concern for both households and governments. Living in cold and/or damp home impacts on health (e.g. respiratory or cardiovascular problems) and causes 'excess winter deaths' (e.g. Wilkinson et al., 2001). People in energy poverty sometimes have to resign themselves to "choosing" between 'heat or eat' (Bhattacharya et al., 2003, Frank et al., 2006, Beatty et al., 2014). Energy poverty also has an impact on mental health (like stress and mental disorders) and social relations (Hills, 2012, Thomson, Snell & Liddell, 2016). Therefore, governments in the EU are recently paying more attention to energy poverty (Thomson et al., 2016).

In Belgium, some information is already known about the prevalence of energy poverty, thus from a quantitative point of view. The federal and regional regulators of the electricity and gas market (CREG at the federal level, CWaPE in Wallonia, Brugel in the Brussels Region, VREG in Flanders) presents yearly statistics (see for instance VREG, 2016), such as the number of households getting into trouble with their energy bill and/or instalment plan, the number of households that are reliant on the grid operator for energy delivery, the number of households with a prepayment meter for gas and/or electricity and the number of gas and electricity cuts. However, these statistics only present a partial picture. From the literature it is known that some people restrict their energy consumption in order to limit their bills (e.g. Wright, 2004) or that people with prepayment meters consume according to their budget instead of according to their needs or wants (e.g. O'Sullivan, 2008). This 'hidden' energy poverty is not tackled by the traditional statistics. This gap is covered by the King Baudouin Foundation and its 'energy poverty barometer' based on EU-SILC data (Delbeke & Meyer, 2015, Meyer et al., 2018). A review of the different estimations of the prevalence of energy poverty is provided in this report (Chapter 4). In this research, quantitative analysis is also undertaken to investigate gender and generation characteristics of energy poverty in Belgium, as well as associated difficulties regarding wellbeing, access to culture and leisure that are experienced by persons living in energy poverty (Chapter 5).

Before the present research, much less was known about how people deal with a situation of energy poverty in their daily life from the point of view of these persons living in energy poverty. In the international literature qualitative research on energy poverty is more common (e.g. Brunner, Spitzer & Christanell, 2012; Day & Hitchings, 2009; Harrington et al, 2005; Maresca & Lacombe, 2015; Middlemiss & Gillard, 2015), but no such studies were undertaken in the Belgian context. Based on 60 in-depth interviews realised with persons living in energy poverty, the present study provides the reader with a scientific picture of energy poverty as experienced in Belgium (Chapter 6).

In recent years, research has linked the situation of energy poverty to the capability approach. Day et al. (2016) have synthesized the extensive research literature on the relationships between energy poverty and capabilities. The concept of capability has been developed during the eighties by economist A. Sen and philosopher M. Nussbaum (see among other: Sen, 1992; Nussbaum and Sen, 1993; Nussbaum, 2000; Sen, 2009). A capability is the possibility to live a good life as defined by the persons themselves in a reasonable way given their context of life. Therefore, the capability approach does not exclusively focus on the availability of means or on subjective well-being. Nussbaum (2000: 78–80) has established a list of ten capabilities that she holds as universal (contrary to Sen for whom capabilities are a person's effective freedom to live a valuable life within his/her own context). Nussbaum's ten capabilities concern: life of normal length; bodily health; bodily integrity; senses, imagination, and thought; emotions; practical reason; affiliation; other species; play; and control over one's environment on both a political sense and a material one. Poverty is thus the deprivation in the capability to live a good life. As explained by Fitzpatrick (2014: 23), "Poverty is what Sen (2009, pp 245–60) calls 'capability deprivation'. Ultimately, what poor people are deprived of is the right to live lives of dignity, freedom and respect in which they possess the opportunities to fulfil their potential." The deployment or not of Nussbaum's ten capabilities by the persons living in energy poverty in Belgium and other groups of people is studied further in this report (Chapter 5). This comparison of the level of capability deprivation between different social groups having different access to affordable warmth is inspired by the relational approach recommended by sociologist Fitzpatrick (2014). For him indeed, "our internal sense of worth [is shaped] in relation to others" (Fitzpatrick, 2014: 27).

In Western societies, social injustice is increasing both within and across countries and it needs to be related to global injustices, such as global warming (Bauman, 2013). In this context, it is likely that energy-related inequalities are also increasing.

2. OBJECTIVES

The 2GENDERS research focuses on energy poverty in Belgium, energy poverty being defined as poverty regarding energy services, as stated above and following Bouzarovski and Petrova (2015: 36). This research describes the phenomenon and the populations affected, ascertain the correlates of energy poverty on social relations, mobility and self-reported health, and design and deliberate possible interventions with a range of important stakeholders.

Particular attention is paid to gender and generational aspects of energy poverty. This is because there is good reason to believe both that energy poverty is not manifest equally between genders and generations – for example single mothers and older people may be more affected – and also that the impacts are not the same between genders and generations – for example health and relationship effects are different between the old and the young. The final aim of the project is to provide policy makers with a set of theoretically and empirically informed policy options and recommendations to alleviate both the occurrence of energy poverty in Belgium. These research directions underlie the acronym of this research, 2GENDERS, for Generation and Gender ENERGY DEprivation: Realities and Social policies.

Energy poverty is a real concern in current Belgian society, as economic inequalities are on the rise. Price increases in housing and energy differentially affect the poorest sectors of society. Access to energy and the services it provides can become insecure, with very negative effects on wellbeing, threatening the dignity and decent existence that are named as fundamental entitlements in the 2000 Charter of fundamental rights of the European Union.

The team to conduct this project is multidisciplinary, which is appropriate as understanding energy poverty and its correlates requires multiple lenses and the work involved needs numerous competencies. Also involved is an international partner from the United Kingdom, where energy poverty has been on the political and research agenda for over two decades.

The objectives of the 2GENDERS research are threefold: 1) to precisely describe this phenomenon of energy poverty in Belgium, the populations affected, namely their gender and generational aspects, the practices and meanings given by these populations; 2) to explore and analyse the other vulnerabilities associated with energy poverty, in particular the relationship vulnerability – including the relationships with social services and associations – the deprivation in mobility, and self-reported health problems associated with energy poverty; and 3) to provide policy makers with a range of policy options and recommendations.

As expressed in chapters 2 and 6, we first used the term of ‘vulnerabilities’ for the difficulties and impairments associated to energy poverty. However, in the more recent and current academic literature on energy poverty, the concept of energy vulnerability is defined in a precise and causal way by Bouzarovski and Petrova (2015: 35) as “the factors that affect the likelihood of becoming poor” and when “combined with the systems of provision approach, energy vulnerability (...) [encompasses] the nature and structure of the home (...)”. Consequently, we use the term “fragilities” in this report.

3. RESEARCH QUESTIONS

Therefore, the research questions are the following:

1. Who are the households living in energy poverty in Belgium and what are the generation and gender aspects of this phenomenon?
2. Do persons living in energy poverty experience other fragilities, especially regarding relationships, mobility, and self-reported health?
3. What are the daily practices of persons living in energy poverty, especially those related to energy consumption, and what meanings do they give thereto?
4. How can we translate the voice of people living in energy poverty and experiencing other fragilities into policy recommendations?

4. OUTLINE OF THIS REPORT

This report has three parts. The first part introduces the topic of energy poverty in Belgium (Chapter 1, written by F. Bartiaux, coordinator of the 2GENDERS research and of this report) and exposes the conceptual framework of this research, its objectives, and its research questions (Chapter 2, written by F. Bartiaux, R. Day and J. Coene). This first part ends with a summary of a conceptual analysis published during this research. N. Frogneux, F. Bartiaux and C. Luyckx show, on the one hand, how Sen's idea of justice as situated within the concept of capability can be relevant for thinking on energy and environmental justice, while on the other hand, it is insufficient for thinking on ecological transition.

They propose a conceptual framework within which a democratic pathway for transition is possible. For this, they suggest turning to non-liberal conceptions of freedom and social imagination using C. Castoriadis' concept of autonomy. (Chapter 3).

The second and most important part of this report is devoted to the results that were obtained during this research and follow two main approaches used in social sciences: quantitative and statistical (Chapters 4 and 5), and qualitative (Chapters 6 and 7). From these chapters, subsequent recommendations are derived (Chapter 8). First, B. Delbeke, S. Oosterlynck, and C. Vandeschrick present in Chapter 4 various ways of measuring energy-poverty prevalence in Belgium, and the pros and cons of these different measures. The range of proportions of households in energy poverty, which the authors calculate, illustrates both the complexity of measuring a multi-dimensional phenomenon like energy poverty and the dependence of these measurements on the data used and their characteristics (availability, reliability, completeness, and so on). Next, Chapter 5 builds on the conceptual framework presented in Chapters 2 and 3 and offers a quantitative analysis on energy poverty and other fragilities that the authors (F. Bartiaux, C. Vandeschrick and N. Frogneux) call "uncapabilities". The authors propose an original typology of households on their access to affordable warmth, and with the Belgian data from the Generation and Gender Programme, they compare energy-poor households and other less-poor social groups. This comparison clearly shows a deprivation of capabilities associated with energy poverty in Belgium in more areas of daily life than presumed in the second research question: not only regarding housing, health, and mobility, but also regarding access to culture and recreational activities, as well as the feeling of fulfilment and ontological security.

Beside these statistical analyses, another major endeavour of the 2GENDERS research was to collect, transcribe, analyse, and compare 60 in-depth interviews made with persons living in energy poverty (20 in each of the three Belgian Regions). The results are presented in Chapter 6 by A. Baudaux, J. Coene, B. Delbeke, F. Bartiaux, A. Sibení, F. Fournier, É. Heymans, S. Oosterlynck, and W. Lahaye. Their analysis is supported by many quotes from these interviews. This analysis reports first on macro-level factors that may cause or aggravate the situations of energy poverty as experienced in the daily lives of the interviewees, such as a poorly-insulated housing stock, the costs and provision of energy, social trajectories shaped by shortages of employment and of low-cost housing, debts often triggered by life accidents, occasional fraud and malpractice by the housing owner, unscrupulous contractors, neighbours, or even energy companies, and high costs of living. Some of these high costs are caused by the fact that living in energy poverty entails more expenditures, such as higher energy consumption for old appliances. This chapter further reports on the everyday practices of energy poor persons: curtailment practices (namely by lone mothers) including severe self-restriction practices related to food and health, practices when having a prepayment meter, cleaning practices (usually in vain) related to struggles with high levels of dampness in the home, and practices of 'getting by'. Other coping practices are then examined, ranging from dangerous alternatives to interpersonal solidarity and use of social services, namely for retrofitting the dwelling in the case of homeowners living in energy poverty. This important Chapter ends by the analysis of other fragilities associated with energy poverty, such as health issues, poor well-being, social isolation, and mobility problems. Throughout this Chapter, generation and gender aspects are studied.

A. Baudaux reports in Chapter 7 on her 3-year participating observation in the Brussels Region among social workers and beneficiaries of social welfare. Seeking personal recognition and seeking a valued home, (non-) use of social services, file fatigue, and alternatives for a fair accompaniment of persons in energy poverty command her analysis of the energy landscape in this Region.

This second and main part of the report ends with policy recommendations (Chapter 8, by B. Delbeke, A. Baudaux, F. Bartiaux, S. Oosterlynck, F. Fournier, and W. Lahaye). These recommendations were developed by the research teams with the in-depth interviews and their analysis in mind. They were further discussed and improved by the members of the users' committee. These recommendations would make an important difference to the lives of people in energy poverty and are related to energy policy (federal and regional levels), housing policy (mainly regional level), and social integration (federal and municipal levels). Concluding this research, its promoters (F. Bartiaux, S. Oosterlynck, W. Lahaye, and R. Day) first summarise its main findings in answering its four research questions, defined above, and then call for strong policies to fight energy poverty (Chapter 9).

The third and last part of this report is devoted to the dissemination and valorisation activities that were undertaken during this research, namely three workshops, one in each Region, to discuss the study results with social workers, and also to thank those who helped the research team find persons living in energy poverty who would accept to be interviewed.

Overall, we hope that this research project will make a highly significant, concrete contribution to the wellbeing of Belgian society through the realisation of cutting edge, internationally informed research and in doing so, will contribute to the wider understanding of energy poverty in Europe by the development of ideas elaborated in the Belgian context.

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