ANALYSIS OF EXISTING ENGAGEMENT TOOLS AND TECHNIQUES IN EU AND BEYOND

Task 3.1 Mapping of existing engagement tools and schemes in EU and beyond

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1. INTRODUCTION

Cities play an important role in addressing global climate change and mitigating risk of more frequent and extreme weather events and their impact on the cities' residents. The energy used in cities' buildings account for approximately 40% of the city's total emission of carbon dioxide in the atmosphere, addressing building energy performance becomes fundamental to encouraging the energy transition process and, in the same time, improve the comfort of the tenants.

PadovaFIT EXPANDED brings together a strong consortium of 8 partners coming from four EU member states. The consortium is coordinated by the Municipality of Padova supported by Università Commerciale Luigi Bocconi, SINLOC, SOGESCA, Forum per la Finanza Sostenibile and Climate Alliance, a European network of local authorities for sustainability. PadovaFIT EXPANDED starts from the knowledge and experience produced in the Padova area and aims at creating and piloting a one-stop-shop dedicated not only for condominiums but for all private residential buildings. Another goal for the project is to expand the business model to the city of Timisoara, who will benefit from the work done in Italy and will adapt it to the Romanian conditions, launching and managing an OSS itself. Finally, the Bulgarian Energy Agency of Plovdiv will support the metropolitan area of Burgas and Smolyan to take the example coming from Padova to prepare the conditions for the launching of sound one-stop-shop in Bulgaria.

The objective of this deliverables is to identify the enabling conditions and EU best practices of Project Promoters (Regional and Local Governments, Energy Agencies and private Businesses) that lead financially sustainable home renovation service schemes, based on public and/or private finance, supporting citizens to target ambitious energy savings. The first part of the work regards the analysis of the JRC report "One-stop-shop for energy renovations of buildings", which represents a review of case studies of past and current OSS, with primary focus on EU Member States. In the report, the JRC has identified the working models and the framework conditions in which OSS are successful and the benefits they offer for the client and/or the economy, pursuing the objective to improve the energy efficiency of the buildings and, ultimately, take actions on climate mitigation. The task should lead to a list of relevant approaches and tools to be adapted to the local need. All of 23 OSS included in the reports were evaluated and analyzed, trying to identify the most interesting aspects that could be useful for future implementation in the PadovaFIT EXPANDED project. The study of the single case has been carried out in the following way: UB took care of the business model for the OSS, the Municipality of Padova of the engagement's aspects, SOGESCA of the technical engineering and, finally, SINLOC of the financial engineering. At the end of this first review, it was created a table in which have been reported the most interesting OSS initiative identified and each project's partner showed the most interesting findings for the respective area of interest. The analysis was focused on the key steps for the implementation process of an OSS for energy renovation: marketing, preliminary proposal, building inspections and energy analysis, quotation

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and financing plan, quality insurance, renovation works, financing, commissioning and follow-up. A great importance it has been given to the assessment of how different choices on each previous element affect the cost incurred and the success of the initiative.

A further step of the analysis of existing OSS initiatives consisted in the creation of questionnaire to be sent to the contacts of the selected OSS, which contains question useful to conduct an in-depth analysis both in technical and financial aspects and to assess the subject regarding the engagement of all the possible stakeholders (private sector, local businesses, financial institutions, building managers and tenants). Every partner agrees that is fundamental to collect more information about the financial viability of such structures, the various form of interaction between the supply side and the demand side and the legal aspect regarding the set-up, the operation and the quality assurance of the OSS.

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2. ABBREVIATIONS

Main abbreviations	
OSS	One Stop Shop
Consortium	Municipality of Padua, Università Commerciale Luigi Bocconi, Sinloc S.p.A., Sogesca S.r.l., Forum per la Finanza Sostenibile, Climate Alliance, Municipality of Timisoara, Energy Agency of Plovdiv
CPD	Municipality of Padova
Uni Bocconi	Università Commerciale Luigi Bocconi
FFS	Forum per la Finanza Sostenibile
JRC	Joint Research Center
EE	Energy efficiency
CO2	Carbon Dioxide
ESCo	Energy Service Company
EPC	Energy Performance Contract
RES	Renewable Energy Sources
SME	Small Medium Enterprises

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3. CAPITALIZING THE EXPERIENCE OF PADOVA FIT! IN ENGAGEMENT AND CONFIDENCE BUILDING

The PadovaFIT Expanded project has been developed as a follow up of a previous initiative: PadovaFIT! (2013-2017), funded by the European Commission through the IEE (Intellingent Energy Europe) programme and coordinated by the Municipality of Padova. This project was designed to address energy poverty and energy refurbishment of private building stock of the city, focusing particularly on condominiums.

The action was developed starting from the role played by the Municipality as promoter and coordinator, which has implemented facilitation policies as to make interventions attractive through a series of free energy audits, support and facilitation services for the condominiums during the decision-making phase, and the identification, through a public tender, of an energy services company (ESCo), dealing with the executive planning of energy measures, carrying out the works and supplying energy to condominiums.

Such actions implied the involvement at local level of different stakeholders and direct beneficiaries of the initiative: owners and tenants, building managers, builders associations, professionals and technicians of the building sector as well as associations sensitive to these issues.

3.1. The role of facilitators, a new professional figure

The main issue in the implementation of energy efficiency measures in condominiums is often due to the difficulty in finding an agreement among owners, fed by the lack of knowledge of the beneficiaries and the difficulty in grasping the economic convenience that these interventions entail. To overcome this barrier, PadovaFIT! consortium has developed a method able to motivate end users to invest in energy efficiency, focusing on the awareness and certainty of the return of the investment in terms of economic, environmental as well as general improvement of quality and comfort of their homes.

The method has focused on the role of the facilitator of condominiums, a new professional figure able to combine both technical expertise regarding energy refurbishment of buildings and the ability to support building managers and condominium assembly through the complex decision-making process required for the energy retrofitting of the condominium. The facilitation process was designed as follows:

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- Agenda for facilitation activities: a schedule of meetings is planned with potential beneficiaries, i.e. house owners, contacting also building managers.

- A preliminary energy audit of the building is performed free of charge, collecting consumption data and buildings profile, with energy analysis conducted by the facilitator in order to assess the real energy condition of the building.

- Collected data are processed by the technical partners who elaborate hypotheses of intervention identifying applicable refurbishment measures, costs analysis, energy savings and return on investment.

- Meetings between the facilitator, the condominium assembly and building managers: presentation of the actual energy conditions of the building, opportunities and advantages of the interventions. Eventually, a second meeting with the technical partners is possible for a deepening of all technical-financial aspects.

- Condominium assembly resolution to join the project (without any obligation or commitment) and registration to "PadovaFIT!" initiative.

3.2. Information and communication initiatives

Many information and communication initiatives have been carried out in the city of Padova specifically aimed at involving building managers and residents to raise awareness on the opportunities and the benefits of joining PadovaFIT! project for building refurbishment purposes.

- Infopoints: many communication activities were carried out in public spaces where citizens would receive directly from facilitators and project partners, detailed information regarding the opportunities deriving from PadovaFIT! project. Spaces gathering lots of potential subscribers have been preferably chosen, such as local markets, shopping centres, other meeting places or public events. A total of 45 info points was organised in the city, attracting a lot of people interested in a totally new topic though rather difficult to understand both on its technical side and economic implications deriving from it. It was easier, in this regard, to approach people via info points held in the context of thematic fairs where participants are in fact already motivated in collecting information on building refurbishment measures.

- Meetings with trade associations: Building Managers National Associations (ANACI and UNAI) have been involved in several different occasions during the project life, both in information and training sessions. Training events were organised in which the project was explained in detail, focusing on the central role would be played by Building managers. All managers have been contacted several times and their availability has been verified continuously; people who responded either positively or expressed interest in receiving more information have been personally engaged by representatives from the Municipality and ITS RED.

- Communication: actions for the communication of project goals have been duly carried out. Here are some of them:

    - The project website www.padovafit.it was created and updated for the entire duration of the project. An easy-to-use application form template is made available on the website http://www.padovafit.it/formulario-interesse-padova-fit/ for an expression of interest in

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participating in the project, both for residents and building managers;

- Punctual updates on project initiatives and information regarding the refurbishment of condominiums have been posted continuously on social media (see the facebook page https://www.facebook.com/padovafit/);
- The PadovaFIT! newsletter was embedded in Informambiente - Padova 21 Office Newsletter and was sent in 23 editions, 2 of which in special editions (Special Energy 2014, Special European Energy Week - EUSEW 2015);
- 15,000 leaflets were delivered to residents in all city districts (in condominiums which met the minimum requirements for joining PadovaFIT!)
- The Municipality has joined and participated in all editions of "M'illumino di meno", the campaign conceived by Rai Radio2 programme “Caterpillar” aimed at promoting energy savings.

3.3. Crucial elements in the engagement phase

The PadovaFIT! experience allows to identify the following crucial elements in the engagement phase and confidence building.

- Stakeholders: it is necessary to proactively involve different groups of stakeholders.
  - Citizens and Condominium Assemblies: they are the ones that will take the final decision (decision-makers)
  - Building Managers and their associations: they are key in the decision-making process in condominiums
  - Small owners’ associations
  - Owners/Tenants Unions
  - Builders associations

It is important to keep in mind that the different target groups might show potential resistance to the implementation of the project: change in status quo, lack of knowledge, generic fear of change, etc.

Main target groups	Barriers	Solutions
Citizens and Condominium Assemblies	-lack of knowledge on energy efficiency -innovative contract solutions face opposition by less informed people	-take time to inform, inform, inform -make technical/financial estimates very clear and transparent -give «official» support to the Delivery Partner

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Main target groups	Barriers	Solutions
	-lack of medium-term planning: priority given to maintenance and urgent interventions -delayed/missing payments limit willingness to invest	-sign «easy» contracts as soon as possible
Building managers (only for condominiums)	-not always have the technical and legal knowledge -management of innovative procurement can be complicated and time consuming -innovative investment actions need extra effort at the beginning and during the monitoring phase – yet no extra remuneration	-provide transparent and independent info on: ◦ turn-key costs ◦ expected performances based on real data and conditions ◦ life cycle costs and life expectancy ◦ quality of the service guaranteed by the Delivery Partner

- Facilitators: The condominium facilitator is a key figure to scout for condominiums and talk to building managers.
    - Training of Facilitators is very important: they have a technical and psychological work to carry out that often needs communication skills rather than technical knowledge.
    - They have more influence on the audience if they are backed up by a representative of the Municipality.
    - They need to keep in mind that citizens look at an EPC contract from a very different point of view, and they usually look for a “safe” solution
    - They need to approach condominium assemblies when the scheme is ready to sign contracts, otherwise their credibility will be limited

3.4. How financial capacity of families influences the engagement phase

This unconventional approach in investigating how financial capacity of families can affect the engagement phase is quite important. For each socioeconomic segment of population, the engagement tools and processes should be differentiated.

The difficulties faced by families when it comes to shouldering extraordinary outlays such as energy saving and efficiency initiatives for their homes are particularly tangible in economically critical periods. Late payment widely affects energy bills and represents a vital indicator for assessing the risk of insolvency faced by families. It is, however, often difficult to obtain reliable and precise figures regarding non-payment, given that relations between suppliers and its clients are private. For those promoting and dedicating resources to projects geared towards redevelopment and energy saving measures for buildings that house less wealthy sections of the populations, it makes it possible to determine the absolute risk involved in the initiative and therefore the practicability of the project for the social and territorial context. It does so by overlapping and examining the area-specific risks, type of urbanization, neighborhood, type of building, family characteristics, income and/or

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source of income. To follow is a table summarizing the degree of risk associated to occupancy type.

TYPE OF FAMILY (ISTAT)	TABLE OF ABSOLUTE RISKS			
	A	B	C	D
Single parent with at least one minor child	40	65	65	100
Couple with at least one minor child	30	49	49	75
Others	26	42	42	65
Single parent with grown-up children	22	36	36	55
Person living alone, less than 65 years of age	20	33	33	50
Couple with grown-up children	18	29	29	45
Couple without children, where the main bread- winner has less than 65 years	16	26	26	40
Person living alone, over 65 years of age	10	16	16	25
Couple without children, where the main bread- winner is over 65 years of age	8	13	13	20

Legend		
Risk	**Location**	
A	Urban peripheries in North-East (Italy)	
B	Urban centers in North-East (Italy)	
C	Urban peripheries in Italy	
D	Urban centers in Italy	
Absolute risk value	**Color**	**Level of risk**
0-19		Low
20-29		Slight
30-39		Moderate
40-49		High
>50		Very high

The table highlights the following key points:

- people living in urban peripheries are generally more easily involved in participatory processes for the refurbishment of their buildings, due to a lower risk connected to the financial capacity of families,
- single parents or couples with at least one minor child are generally facing higher financial risks compared to elderly people living alone or in couples without children,
- these statements are valid only within the same geographical context (i.e. North-East) and has not a general validity.

These conclusions must be integrated with other socioeconomic elements. The literature highlights three additional points:

- younger people have a higher inclination in investing for the refurbishment of buildings (higher environmental awareness and higher interest in long-term return of investments),
- people having the ownership of a building have a higher willingness in investing on it, compared to

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those renting their house,

- employed people generally have higher financial opportunities for investments.

This global overview on how financial capacity of families affects their interest in energy renovation processes is quite important with respect to the engagement phase. Indeed, different solutions must be found for each situation and different levers need to be touched to stimulate the participation of end-users in the project.

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4. GENERAL OVERVIEW OF THE OSS/EXISTING INITIATIVES

This report aims at providing a map of existing engagement instruments and schemes across Europe. This map represents a key tool for the set-up of an OSS for energy performance improvement in private buildings, orienting the decision considering also the lesson learnt in other similar experiences. The mapping is primary focus on the EU Member States and is mainly based on the report developed by the European Commission, Joint Research Center (JRC) in 2018[1]. At first, the Consortium decided to focus its analysis on the cases showcased in the JRC report, considering it as a good starting point embedding critical information and data. The JRC's report considers in detail 5 Research and innovation projects and 28 Case studies of one-stop-shops, closed or on-going. For Research and innovation projects is meaning projects whose core objective is not the establishment of an OSS, but they explore and/or develop business models utilizing the OSS idea, or disseminate knowledge and information about them. These projects are:

- Eracobuild
- One Stop Shop project
- INNOVATE
- REFURB
- COHERENO

As far as the case studies are concerned, the report clusters the reviewed examples in the following categories:

- Local government supported or initiated OSSs;

[1] Boza-Kiss Benigna, Bertoldi Paolo, *One-stop-shops for energy renovations of buildings*, European Commission, Ispra, 2018, JRC113301

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- Independent consultant based OSSs;
- Industry-driven OSSs;
- Funds or financial credit lines with primary aim to support the financing of energy efficiency market while they boost their services with technical assistance and/or tool.

4.1. Methodological approach

The Consortium show-cased more than 25 initiative related to OSS, planned or implemented. The methodological approach adopted in the analysis consists in 2 steps.

4.1.1. STEP 1 – COMMON MATRIX

The first is the detailed analysis of the identified initiatives. In concrete terms, the Consortium created a matrix, in which each partner involved (Sinloc, Sogesca, FFS, CPD, Uni Bocconi) has defined the relevant dimensions for its analysis. In particular, the action has been divided as follow:

Issue	Partner involved
General information	All
Business Model for OSS	Uni Bocconi
Engagement and Confidence Building	CPD
Technical Engineering	Sogesca
Financial Engineering	Sinloc, FFS

Starting from the information available in the JRC's report, the Consortium filled the matrix looking for further information also on other sources of data, mainly on the web. The analysis of the case studies was run by the partners, considering 4 case studies each. The main results of the matrix have been summarized in the annex, highlighting the key elements in relation to the engagement of homeowners and tenants.

4.1.2. STEP 2 – QUESTIONNAIRE

In order to collect additional information, the Consortium agreed on write a questionnaire to be submitted to the OSS. After the mapping of Step 1, the Consortium decided to focus on a smaller set of initiatives to deepen the understanding of aspects of interest. As happened for step 1, partners designed a set of questions in accordance to their competences. Questions have been shared among all the partners involved and a final version of the questionnaire was prepared. In the following paragraphs the presented approach is described more in details.

4.2. Case studies selection

In order to choose which initiative will be further analyzed, among the 28 composing the JRC's report, the Consortium proceeded voting. Each partner presented to the others which were the most relevant case studies from its point of view.

Below the engagement criteria adopted in the selection process. The selection process followed some simple

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criteria in order to identify the most interesting initiative from the point of view of the engagement of homeowners. Starting from the results of Step 1, given the presence of different schemes –in terms actors involved and engagement processes – Municipality of Padova's goal was to collect further data on all the existing engagement models and solutions offered by OSSs. In this respect, the preferred case studies result the following:

- **BetterHome**: a service-oriented project for homeowners and installers
- The **Reimarkt** web tool
- **SPEE Picardie**: from the initial engagement to the post-works support
- The **DESEU** Energy Star Home Advisor and the **DESEU** home energy counselling and check-up program for residential buildings
- The cooperative model proposed by **Retrofit**
- The consumer centric approach of the **Clear Project** (not included in the list above but particularly significant from the engagement perspective)

All these case studies have been analyzed more in depth in chapter 5. Gathering all the preferences expressed by the partners, the selected OSS' case studies are:

OSS case study		N° preferences
1	**BetterHome**	3
2	**Energies POSIT'IF**	3
3	**RenoWatt**	3
4	**Oktave**	2
5	**Reimarkt**	2
6	**SPEE Picardie**	2
7	**CLEAR project**	1
8	**Deseu**	1
9	**Retrofit**	1
10	**Småland**	1
11	**PKA**	1
12	**Kredex**	1

4.3. Analytical study

In order to deepen the understanding and the mapping of the initiative, the Consortium developed a questionnaire to be deployed directly to the OSS selected in the previous phase. This document is focused on finding the right way to reach out to citizens and support them in taking informed decisions about refurbishing their homes. The work is focused on understanding the most suitable approaches and tools to engage citizens in investing in energy renovation. Main elements will be:

- Right moments to engage / Stage of life (urgency to renovate, empty nesters, constraints, ….)

- Governance impediments (condominium assembly, building manager, ….)

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- Knowledge gap; Consumer style / Financial possibilities

- Neighborhood type; Examples of buildings / Testimonials

4.3.1. METHODOLOGICAL CREATION OF QUESTIONNAIRE

The Consortium decided to develop a questionnaire to be deployed to the contact person of the selected OSS initiatives to gather further information in respect of that already included in the JRC report. As said before, each partner was in charge of developing few questions in respect of its field of expertise. The questionnaire is composed by 3 sections:

- Technical: developed by Sogesca
- Financial & Business Model: developed by Sinloc and FFS for the financial component, while Uni Bocconi focused on understanding Business model features and replicability
- Engagement: developed by CPD

All the questions have been collected and the questionnaire is going to be sent to the OSS in an editable form. OSS will be asked to fill in the questionnaire. The feedbacks will provide a more in-depth view of case studies and will be included in the development of the strategy for citizens engagement with action plan, expected in task 2.3.

4.3.2. ENGAGEMENT QUESTIONNAIRE

The engagement questionnaire is reported below.

- Which legal form did you choose for your One Stop Shop initiative?
    a. Municipality-owned
    b. Public/private partnership
    c. Private operator
- How did you choose to develop and implement your OSS?
    a. New and independent entity
    b. Part of a bigger organization (e.g. municipality, business association)
    c. Other
- How do you interact with your potential costumer?
    a. Office/s
    b. Online tools
    c. Personal visits (direct contacts)

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d. Other

- How many external partners did you need to implement the project and which expertise do they offer to you?
- How many people did you need to set-up the OSS? How did you choose them?
- In which scope it was necessary to integrate new competences?
- How many people are involved in the roles listed below?
  a. Legal
  b. Administrative
  c. Technical
  d. Financial
  e. Customer care service
  f. Other

4.3.3. ANALYSIS OF EXISTING INITIATIVES: MAPPING OF ENGAGEMENT TOOLS AND TECHNIQUES

One of the most important activities that should be pursued by the one-stop-shop is the attraction of potential investors for the retrofit of the buildings: the building owners and tenants. To reach this goal the one-stop-shop can exploit different type of communication channels. From the analysis of the most relevant one-stop-shop experiences in Europe, the main instruments that can be used are listed below:

- online tools,
- local media,
- direct contacts,
- one-stop-shop info point,
- local events,
- intermediaries.

One stop shop	**Type of channels to provide information about the one stop-shop**
Reimarkt BetterHome Haarlemnse Huizenaanpak Tighean Innse Gall	Online tools • emails • websites • social media

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One stop shop	Type of channels to provide information about the one stop-shop
DESEU CLEAR project Retrofit Works Clean Tech Adsboll – Projekt Lavenergi	• web advertising • FAQ
ENRA Concept Bolig EnØk Tighean Innse Gall DESEU Clean Tech Adsboll – Projekt Lavenergi	Local media advertisement • newspapers • TV • radio • magazines • poster designing/advertising in cities (in petrol pump stations, on retrofitted buildings, etc)
ENRA Concept Bolig EnØk Haarlemnse Huizenaanpak Tighean Innse Gall Public Energy Efficiency Service (SPEE Picardie) CLEAR project Clean Tech Adsboll – Projekt Lavenergi	Direct contacts of customers • telephone • home visits • newsletters
Reimarkt CleanTech Adsboll – Projekt Lavenergi Be Reel!	Creation of a one-stop-shop info point
Reimarkt ENRA Concept Bolig EnØk DESEU Be Reel!	Organization of local events • information evenings for citizens • brochure distribution • local exhibitions/community events at neighbourhood level • local forums and fairs • communication during the participation process for the co-design/renovation of urban areas
Be Reel! Clean Tech ENRA Concept Bolig EnØk	Communication via Intermediaries • communication via energy bills (energy suppliers) • communication via bank creditors and local enterprises working in the building retrofitting sector

Each instrument is characterized by pro and cons.

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Type of channels	Pro	Cons
Online tools	-Wide audience reachable -Fast and cheap way to inform people	-No direct contacts -The target is limited to the web users
Local media advertisement	-Wide and assorted audience reachable -Attractive and effective instrument (already tested in other fields)	-It can be expensive -Need of a communication expert
Direct contacts of customers	-Direct contacts are more effective -No need to create a breeding ground	-The audience is limited to the existing customers
Organization of local events	-The participants are already proactive and open to novelties -Helpful in the starting phase to disseminate at local level the existence of the one-stop-shop	-It can be expensive -It can be time consuming -The audience is limited to participants
Communication via intermediaries	-The communication can be more effective	-It is necessary to give a role/benefit to the intermediaries

The activity carried out by the OSS can be very useful for a building owner or tenant. The OSS can:

- Provide information about energy efficiency in general
- Provide tailored advices about potential improvements in his/her home
- Act as a single point of contact and single point of payment
- Create a trust towards one provider (previous results of the provider may be known, and/or guarantee of service)
- Guarantee the implementation through a complex approach, instead of step-by-step approach when done on his/her own
- Provide the evaluation of several alternatives
- Conduct quality controls and ensure quality assurance of technical partners
- Guarantee a quicker completion
- Assist in financing

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5. HOW THE HOMEOWNERS ARE INVOLVED AND CONFIDENCE IS BUILT?

In the first phase of the process the building owner or tenant should be engaged, using one the proposed instruments. Immediately after, the confidence must be built, providing further information with a personal assistance, giving practical feedbacks through the use of fast-check instruments, tailored on the user's needs, highlighting the benefits deriving from the adhesion to the one-stop-shop proposal.

Looking at the existing one-stop-shops it is possible to identify three types of instruments to strengthen the confidence of the users:

- Creating **fastcheck tools** such as webtools or thermal audits, in order to provide technical feedbacks and address the renovation approach
- Including the users into **communities** (web communities or neighbourhood communities) **and/or purchasing groups**, to increase the opportunities offered to them
- Providing a **personal assistance**, taking into account not only the technical aspects (such as with the fastcheck tools) but also the motivational and behavioural ones and supporting the users along all the refurbishment process from the selection of the suppliers/contractors, to the execution of works and the post-works follow up.

The fast-check tools are quite easy to be implemented and simple to be used. They can also reach a very large number of potentially interested people. This is the fastest way to engage people in a refurbishment process but does not guarantee the creation of a high level of confidence, because there is not a direct contact between users and promoters and the tool does not assure the prosecution in the process.

On the opposite side we can find the personal assistance approach. In this case the costs are higher, since the relationship between users and promoters is one to one. This approach guarantees a high level of confidence, but a low level of easiness of engagement.

Type of instrument	Easiness of engagement	Level of confidence built
Fast-check tools	High	Low
Communities and/or purchasing groups	Intermediate	Intermediate
Personal assistance	Low	High

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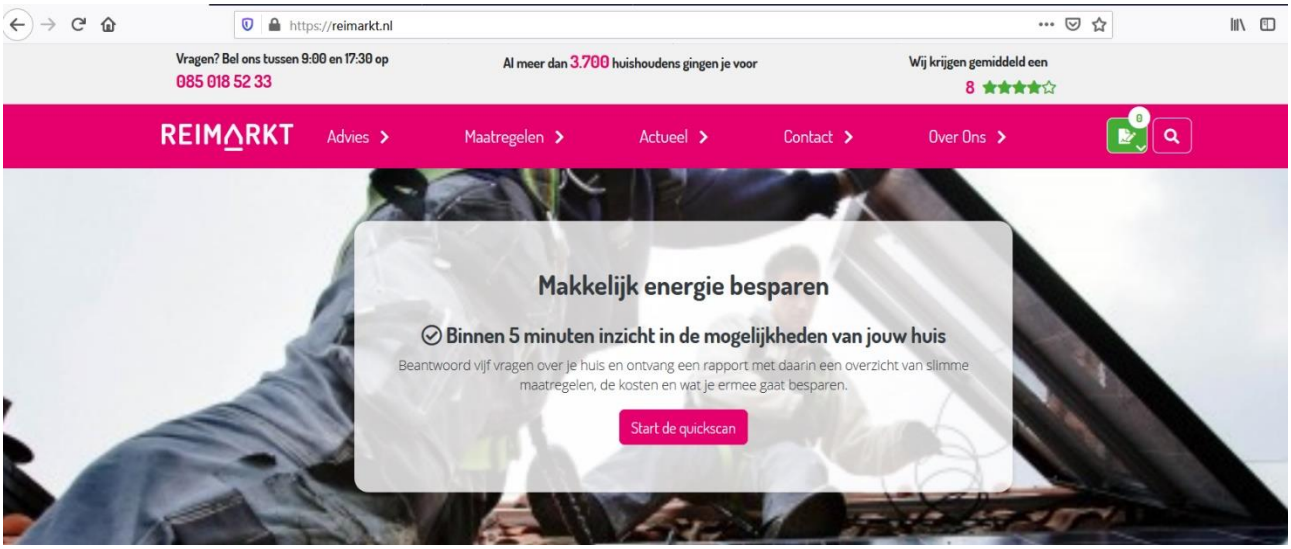
In the following paragraphs, the most interesting examples from the existing one-stop-shop case studies, have been described.

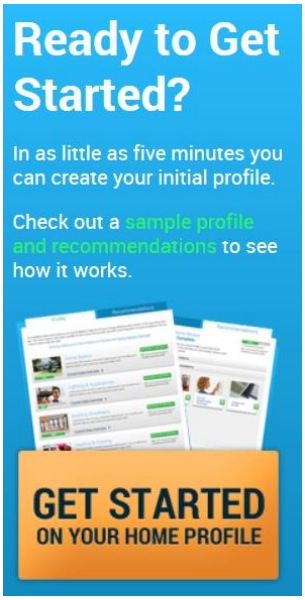
5.1. The online fast-check tools

5.1.1. THE REIMARKT ONE-STOP-SHOP WEB TOOL

The **Reimarkt web tool** (https://reimarkt.nl/quickscan) provides a quick-scan of the building, collecting information from the end users and suggesting the best retrofitting options in a simple report. The tool allows to select the characteristics that most closely matches its own situation. Based on this, costs and benefits are calculated for the house and a smart package is determined.



5.1.2. THE DESEU ENERGY STAR HOME ADVISOR



The **DESEU Home Advisor** (https://www.energystar.gov/campaign/assessYourHome) is a very helpful instrument to increase its own home's energy efficiency and all-around comfort. It is possible to create a profile of its own home's energy efficiency features and get a prioritized list of energy-saving recommendations customized to your home. The tool is developed in three simple steps:

- Create your home's energy profile: Let the Home Advisor walk you through creating your comprehensive home profile. Don't have all the information right now? That's ok; you can always come back.

- Get custom recommendations: Using your home's unique profile, the Home Advisor gives you prioritized recommendations for improving energy efficiency.

- Improve your home's efficiency: Build your list of improvements and track your progress. Update your home's profile and view the latest recommendations.

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5.2. The communities and/or purchasing groups

5.2.1. THE CONSUMER CENTRIC APPROACH OF THE CLEAR PROJECT

The aim of CLEAR project is to actively guide consumers through all the stages leading to the purchase of domestic renewable and low-carbon energy technologies. The main needs of a home, including heating/cooling, electricity and domestic hot water, are addressed through a consumer-centric approach and actions that are meant to lead to the purchase of renewable energy technologies such as solar photovoltaic, solar thermal, heat pumps and wood pellet stoves (for space heating). CLEAR's objective is to lower market barriers to the purchase of RES, hence raising consumers capacity to take informed decisions:

- Creating a renewable energy web community which provides consumers with innovative ways to share experiences and know-how, exchange best practices, watch how-to videos and review systems and local installers. The new online RES hub is hosted on popular consumer organisation websites.
- 'Hooking' consumers with independent and expert information gained out of laboratory tests on micro-generation technologies.
- Raising the consumer capacity to take informed decision with personalised decision-making tools. These range from an interactive tool enabling consumers to find out which technologies are suitable for their needs and property, to investment tools enabling householders to find out how long it might take for a system to pay for itself and how much money and energy they could save.
- Activating consumers to purchase RE technologies through incentives that bring down cost like group purchase schemes. Personal contact is very important in order to engage consumers to purchase and to act. Thus, consumer organisations provide services such as an individual helpdesk and newsletters, while launching local information sessions to get closer to consumers.
- Transforming adopters of RE systems into ambassadors to convert more consumers through the renewable energy community and social media.

In Italy, the project partner Altroconsumo provides to the citizens a web portal where it is possible to:

- compare and evaluate the technologies,
- participate to a purchasing group,
- be aware of the current existing financial incentives and opportunities,
- adhere to a credit offer to obtain special conditions for the retrofit of its own building.

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5.2.2. THE COOPERATIVE MODEL PROPOSED BY RETROFIT WORKS

RetrofitWorks is a 'not for private profit' multi-stakeholder cooperative. A coop is an organisation or business owned and run jointly by its members, who share the profits or benefits. It involves mutual assistance in working towards a common goal. RetrofitWorks it's run by the members for the members and their local communities' benefits.

Two main member types are:

- RetrofitWorks Advocates – organisations representing or nudging a constituency of potential customers towards better performing buildings, acting as trusted advisers on their behalf such as community groups, Local Authorities and other local stakeholders. These organizations want to support local, quality retrofit activity. They are seeking a way of engaging with a local vetted supply chain to help advise on and carry out works.

- RetrofitWorks Practitioners – certified, local SME companies wishing to carry out retrofit advice, assessment, design, coordination, and installation work. Practitioner members are organizations or individuals working in the building industry, for example; installers/contractors, energy assessors, architects, designers, project managers, and other refurbishment specialists. Quality checks are carried out when installers join a cooperative, to ensure a high standard of workmanship.

RetrofitWorks Advocates	**RetrofitWorks Practitioners**
• Support the community • Generate local retrofit jobs • Help residents improve their home comfort • Attend members meetings • Represent the needs of residents in retrofit • Create economic activity in the area • Support collaborative tenders and funding bids	• Become a full trading member • Enter into a commercial relationship • Receive leads from the cooperative • Build your own team • Access to tenders and grants • No more main contractor • Own and run by you • Coop profits returned • Attend meetings

Trust is created by bringing the demand and supply chain together. Advocate members have a say on quality control. Practitioners have a say on logistics of delivery. All Practitioners are vetted and fully trained. Retrofit quality is ensured by the appointment of a Retrofit Coordinator to every job.

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RetrofitWorks assists Advocates in creating retrofit schemes, replicable within any geographical area, using local branding. RetrofitWorks sit in the background managing works and assisting with finance where applicable, using local SME contractors. RetrofitWorks is a TrustMark scheme. It is a not-for-proft organisation but expects its members to make a fair profit. By joining the co-op, Advocates have access to a local supply chain and delivery tool, using quality vetted contractors. Practitioner trade members gain access to grants and customers delivery schemes. Property owners get one-stop shop service, independent retrofit advice and up to three comparable quotes.

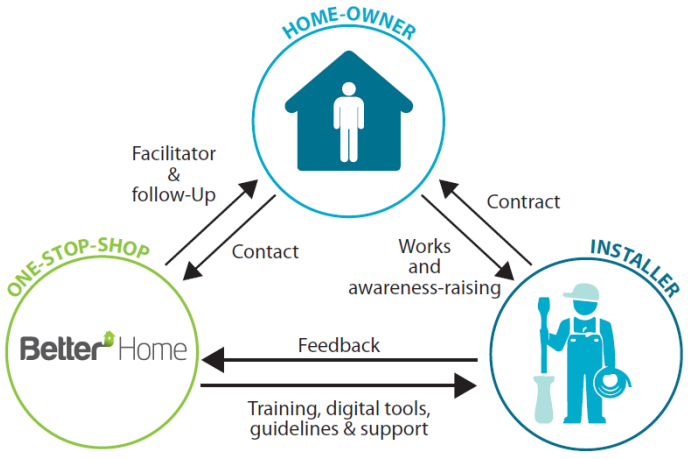
5.3. The personal assistance services

5.3.1. BETTERHOME: A SERVICE-ORIENTED PROJECT FOR HOMEOWNERS AND INSTALLERS

In this service-oriented model, the homeowner is offered tailor-made solutions based on his/her specific preferences, covering energy improvements on the building envelope and heating, cooling, ventilation and hot water systems inside the building. The BetterHome model specifically targets the average building owners that do not understand every aspect of their building but can envisage renovating to reduce energy costs and improve comfort and health. BetterHome provides these homeowners with a convenient solution to improve their homes. Most are directed to the BetterHome website through online tools (especially Google and Facebook) or referrals from their banks, utilities or personal contacts.

The success of the home-owner-centric business model can be explained by the advanced service-oriented role of the installers. BetterHome trains and guides the installers on how to approach the homeowner, from the first contact to the finalisation of the process. In support, BetterHome also simplifies and structures the renovation process for the installer, through supportive and innovative digital tools, enabling a better evolution for all involved.

As facilitator, BetterHome is transforming a complex and fragmented renovation process into a simple and straightforward procedure for the homeowner. The process map illustrates the connection between a one-stop-shop, the building owner and the installer. For the building owner, BetterHome is a one-stop-shop that ensures a reliable and smooth renovation process. For the installers, BetterHome clusters suitable projects and offers training, guidance and support, helping them to better structure the renovation process. As in a conventional process, the installer and the building owner enter a contract.



In order to increase investments in energy renovations, the sales pitch must be tuned beyond energy savings and returns on investment and focus on indoor comfort and air quality as well. To achieve this goal, part of the installers' training focuses on how to address potential customers and get them to realise the full value of energy renovations. The image below is a simplified version of the installers' dialogue guidelines for the first steps of the process, from the initial contact to a signed contract.

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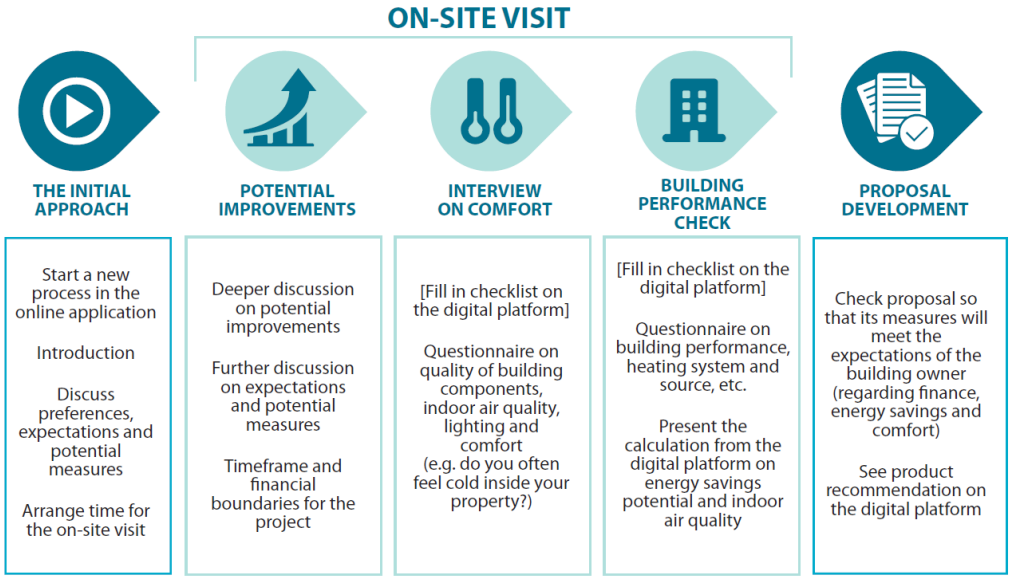

5.3.2. SPEE PICARDIE: FROM THE INITIAL ENGAGEMENT TO THE POST-WORKS SUPPORT

The Regional Council of Picardie has decided the creation of a Public Energy Efficiency Service (Service Public de l'Efficacité Energétique or SPEE), which is an integrated service for the energy renovation of residential buildings, which offers advice, accompaniment, and financing of thermal retrofit projects of private homeowners. The objective of the SPEE is to achieve thermal retrofit projects with a goal to save 50% to 75% of final energy consumptions, depending on the configurations.

The main objectives of this project are:

- Mobilise the local offerings of advice and works
- Propose a thermal audit and advice to households
- Propose a financing solution
- Accompany homeowners during and after the works

Several initiatives were taken to stimulate the demand for thermal retrofit. The most important is the deployment of the Energy Information Space network towards a more upstream accompaniment of residential homeowners during and after the works with retrofit technicians (15 advisors). The management of the SPEE is ensured by the creation of a personalised agency that plays the role of project management assistant towards residential homeowners.

The SPEE ensures following services:

- Advice to residential homeowners (realisation of a thermal audit and proposal of measures)
- Assistance to the execution of the works (support in choosing contractors, follow-up of the measures,

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post-works follow-up)

- Third party financing ensured by the SPEE or by partner financial institutions (long term loan) in accordance with the debt capacity of the homeowner

- Long term accompaniment and maintenance of the equipment

The SPEE has streamlined a process along the following steps:

Project phases	Main steps
Engagement of homeowners	1.Receipt of demands by phone, sorting between simple requests for information and real projects 2.On site visit 3.Complete thermal diagnosis and determination of scenarios of works 4.Contractual agreement with the SPEE 5.Request for proposals and choice of contractors 6.Implementation of the financial proposal
Execution of works	7.Execution of works (with initial and intermediate meetings) 8.Reception (i.e. approval) of works
Post works	9.Post-works visits (1/year for 5 years) 10.Management of financial “events” (defaults, mutations...).

5.3.3. THE DESEU HOME ENERGY COUNSELLING AND CHECK-UP PROGRAM FOR RESIDENTIAL BUILDINGS

Energize Delaware is a one-stop resource for sustainable energy solutions with no cost for end-users. The program has been developed for Delaware residents to take charge of their energy future, with multiple ways to make their homes more comfortable, energy-efficient and environmentally friendly.

The HEC^2 Program is designed to empower Delaware residents by providing access to high-quality energy-efficiency education, products and services.

a. *In-Home Energy Check-Up and Counselling*: an energy expert comes home and check the condition of its insulation, heating and air-cooling system, lighting, appliances, air leakages, windows and doors, water heating equipment, to identify simple ways to help save energy and money. Furthermore, the expert installs free energy-saving products (up to a $100 value). This is a fast, easy way to increase the energy efficiency of the home and help start saving immediately. The process for the check-up includes:

    - Interview

    - Walk-Through

    - Energy Counselling: following the visit, the homeowner receives a report with information about energy-related programs for repairs, rebates and utility assistance

    - Installation: the installation may include LED light bulbs, faucet aerators, efficient flow-fixed showerheads, water-heater pipe insulation, etc.

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b. *Energy-Conservation Workshops*: during this workshop, the homeowner learns low-cost and no-cost ways to save energy and receive a free Weatherization Kit (a $30 value). It is delivered in a group setting. The workshops lasts 1-hour. Each workshop includes:

- Do-it-yourself tips for energy conservation
- Information about energy-related programs for repairs, rebates and utility assistance
- One free Weatherization Kit (a $30 value), including LED light bulb, LED night-light, rope caulk, hot water tester, smart power strip

c. *Pop-up Energy Counselling*: a trained Energy Educator discusses the homeowner energy-related needs and provide advice and referral services. It is designed to be a specialized Energy Education and Resource visit, that lasts approximately 20-30 minutes. This meeting can be scheduled at a public location (i.e. library, community center, local utility office, etc.). The process for the counseling includes:

- Intake Interview
- Energy Counselling: the goal of energy counselling is to create energy awareness and reduce home energy needs and thereby the need for future energy assistance. The Energy Educators give recommended low-cost and no-cost tips for improvement, review your energy bill and discuss the impact of the utility bill on your overall household budget.
- Energy-related Referrals: the energy educator uses available resources to offer referrals to energy-related programs that could assist the homeowner with an energy-related burden.
- Energy Advocacy: if the homeowner has any other barriers or concerns with its electric bill and/or utility provider, it is beneficial to participate in energy advocacy. Through partnerships with the various utilities, the energy educator contacts the utility, with the homeowner permission, in order to assist with the account. This could include delinquencies, disconnects, requesting more detailed information, budget billing and/or creating payment-plan arrangements.

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6. CONCLUSIONS AND FURTHER STEPS

One of the most important activities that should be pursued by the one-stop-shop is the attraction of potential investors for the retrofit of the buildings: the building owners and tenants. To reach this goal the one-stop-shop can exploit different type of communication channels. The main instruments that can be used are listed here: online tools, local media, direct contacts, one-stop-shop info point, local events, intermediaries. Each instrument is characterized by pro and cons. The online tools and the local media advertisement can reach a wide audience, whereas using direct contacts or organizing local events can limit the number of reachable people. On the other side, involving already engaged customers could be more effective, since there is no need to create a breeding ground and there is a proactive and open-mind approach of the participant.

The activity carried out by the OSS can be very useful for a building owner or tenant. The OSS can provide information about energy efficiency in general, provide tailored advices about potential improvements in his/her home, act as a single point of contact and single point of payment, create a trust towards one provider (previous results of the provider may be known, and/or guarantee of service), guarantee the implementation through a complex approach, instead of step-by-step approach when done on his/her own, provide the evaluation of several alternatives, conduct quality controls and ensure quality assurance of technical partners, guarantee a quicker completion, assist in financing.

If in the first phase of the process the building owner or tenant should be engaged, using one the proposed instruments, immediately after, the confidence must be built, providing further information with a personal assistance, giving practical feedbacks through the use of fast-check instruments, tailored on the user's needs, highlighting the benefits deriving from the adhesion to the one-stop-shop proposal. Looking at the existing one-stop-shops it is possible to identify three types of instruments to strengthen the confidence of the users: creating **fastcheck tools** such as webtools or thermal audits, in order to provide technical feedbacks and address the renovation approach; including the users into **communities** (web communities or neighbourhood communities) **and/or purchasing groups**, to increase the opportunities offered to them; providing a **personal assistance**, taking into account not only the technical aspects (such as with the fastcheck tools) but also the motivational and behavioural ones and supporting the users along all the refurbishment process from the selection of the suppliers/contractors, to the execution of works and the post-works follow up.

To integrate the main conclusions described above, the Consortium decided to develop a questionnaire to be deployed to the contact person of the selected OSS initiatives to gather further information in respect of that already included in the JRC report. Each partner was in charge of developing few questions in respect of its field of expertise. The questionnaire includes a section for citizens engagement. All the questions have been collected and the questionnaire is going to be sent to the OSS in an editable form. OSS will be asked to fill in

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the questionnaire. The feedbacks will provide a more in-depth view of case studies and will be included in the development of the strategy for citizens engagement with action plan, expected in task 2.3.

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7. APPENDIX

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Name of the initiative	GENERAL INFORMATIONS					WP3 - ENGAGEMENT AND CONFIDENCE BUILDING WP LEADER: CPD	
	Location	Geographic coverage	Timeframe - Current status	Target clients	Contacts and further information	Channels	Customer relations
Reimarkt	6 locations in the Netherlands	Municipality level	- Company set up in 2014 - Running	Owners and tenants of private housing	http://reimarkt.nl/ https://www.youtube.com/watch?v=ktCjLOv9qeE&feature=youtu.be Email: info@reimarkt.nl tel.: +31(0)88 529 00 97	Mainly online, but visits at the office (personal advice), exhibitions, no home visits	- Online tools - Websites, newsletters - Pop-ups shows in the neighborhoods
Energies POSIT'IF	Pantin (Ile de France Region)	Ile de France Region	- 05/04/2013 to 04/04/2016 (EU IEE MLEI project ended) - 2013 start date of the ESCo/OSS (ESCo/OSS is still operational)	Condominiums (homeowners' associations, social housing companies)	- http://www.energiespositif.fr/ -https://ec.europa.eu/energy/intelligent/projects/en/projects/posit-if - http://www.energy-cities.eu/IMG/pdf/infinite_solutions_iledefranceregion.pdf - Jean-Claude Gaillot, email : Jean-claude.gaillot@energiespositif.fr, tel.: +33 – 1 - 53 85 56 80	Personal advisers	- Personal advice, arrangements: local energy info points, local energy agencies and OSS partners - Meetings with national institutions - Leaflet for final beneficiaries - Website - Newsletters
KredEx	Tallin, Estonia	National	- Established in 2001, with the revolving fund established in 2009 - Running	Multi-apartment building managers	https://kredex.ee/en/energy-efficiency/	n/a	The Fund is putting considerable effort in promoting more efficient use of energy resources and in raising energy efficiency awareness
Energy Efficiency and Renewable Sources Fund (EERSF)	Sofia, Bulgaria	National	- Established in 2005 - Running	- Municipalities, hospitals and universities - Small and medium enterprises - Citizens	Energy Efficiency and Renewable Sources Fund, 4 Kuzman Shapkarev Street, 1000 Sofia-Bulgaria, tel.: +359 2 81 000 80, email: info@bgeef.com	Technical assistance provision via advisors	No special attention on general information dissemination, awareness
ENRA concept	Finland (no more precise information)	Finland (national)	It was in a starting phase (Closed in 2010)	Primarily singlefamily houses from 1940-90's (mainly so called "Veteran houses")	http://successfamilies.vtt.fi/SF_D32_20121029F.pdf	- Information about the service in local newspapers, in the magazines of local house owners' associations - Local community environment plans - Local information evenings - Home visits - Telephone or another follow-up	- Dedicated personal assistance by advisors (one-point-of-contact), - information disseminated about the service, - follow-up
Bolig Enøk	Askim, Norway	Østfold, Akershus and south east of Oslo (Norway) (regional)	- Started in 2011 - Mature, but reformatted (as of 2017, the company seems to work as an advisor/facilitator rather than a holistic service provider)	Owners of single-family houses from 60-80's in selected areas in the region of Østfold, Akershus and south east of Oslo, who are creditworthy to increase their mortgage loan.	- http://successfamilies.vtt.fi/SF_D32_20121029F.pdf - https://boligenok.no/	- Information about the service in local newspapers, in the magazines of local house owners' associations - Local community environment plans - Local information evenings - Home visits - Telephone or another follow-up	- Dedicated personal assistance by advisors (one-point-of-contact), - information disseminated about the service, - follow-up

Name of the initiative	GENERAL INFORMATIONS					WP3 - ENGAGEMENT AND CONFIDENCE BUILDING WP LEADER: CPD	
	Location	Geographic coverage	Timeframe - Current status	Target clients	Contacts and further information	Channels	Customer relations
BetterHome	Frederiksberg, Denmark	Denmark, and recently launched in Sweden	-Started in 2014 - Running (the OSS)	Mainly single-family houses constructed between 1950 and 1990	- http://www.betterhome.today/ - http://bpie.eu/publication/boosting-renovation-with-an-innovative-service-for-home-owners/ - Niels Kåre Bruun, administrative director, email: nkb@betterhome.today, tel. +45 35 300 400	Mainly online	n/a
Haarlemse Huize-naanpak	Haarlem, the Netherlands	Haarlem	- 2014 - Running	Private homeowners	- http://bpie.eu/wp-content/uploads/2015/12/COHE-RENO_final-conference.pdf - https://huizenaanpak.nl/	Online, email, phone, home visit	- Adverts in local media - Meetings in Neighbourhoods - Markets around sustainable living - Neighbourhood initiatives
Tighean Innse Gall	The Western Isles (the UK)	Local/regional	- Started in 1991 - Running	principally target the housing, community group and small business sectors	info@tighean.co.uk, stewart@tighean.co.uk	Variety of channels, including TV spots, newsletters, online materials, social media, personal advice and home visits, etc.	The most valuable service is the personal advice in the homes. This allows the OSS to fully understand not only the technical, but also the motivational and behavioural aspects of energy use and offer corrections in all aspects.
Energy Savers	Chicago	The territory of Chicago region = the seven counties in northern Illinois surrounding Chicago	- 2008-2014 (?) – now substituted by “Elevate Energy” - Closed	Homeowners in the multifamily buildings in the Chicago region	https://rpsc.energy.gov/sites/default/files/reports/c-705_EnergySavers.pdf Peter Ludwig, Energy Efficiency Programs Manager, CNT Energy, email: peter@cntenergy.org, tel.: +1/773.269.4048	n/a	Not much focus on general information dissemination
Elevate Energy	Chicago	Illinois	- 2014 (?) – as a follow-up of Energy Savers programme - Running	- Multifamily buildings - 1-4 unit buildings - Nonprofit buildings and childcare centers	https://www.elevateenergy.org/ 322 S. Green Street, Suite 300, Chicago, IL 60607, email: info@elevateenergy.org, tel.:+1.773.269.4037	n/a	Not much focus on general information dissemination
DESEU (Home Performance with ENERGY STAR program)	Delaware	Delaware (national)	- 2014 - Running	Residential buildings	https://www.energizedelaware.org https://www.energizedelaware.org/home/deseu/	Direct mail, brochures, radio ads, social media, email blasts, newspaper ads, gas station pump toppers, community events, and Google search engine marketing.	
Public Energy Efficiency Service/SPEE Picardie	Amiens, France	Picardie region	- 05/04/2013 to 04/04/2016 (project); 2013 start date of the ESCO/OSS, currently operational - Running, planned, closed (of the OSS and/or the project)	Residential buildings	http://citynvest.eu/content/spee-picardie http://www.pass-renovation.picardie.fr/ contact@picardie-spee.fr +33 (0)810 140 240	Mainly personal, supported by online materials for information	- Advice to residential homeowners (realization of a thermal audit and proposal of measures) - Assistance to the execution of the works (support in choosing contractors, follow-up of the measures, post-works follow-up) - Third party financing ensured by the OSS or by partner financial institutions (long term loan) in accordance with the debt capacity of the homeowner

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Name of the initiative	GENERAL INFORMATIONS					WP3 - ENGAGEMENT AND CONFIDENCE BUILDING WP LEADER: CPD	
	Location	Geographic coverage	Timeframe - Current status	Target clients	Contacts and further information	Channels	Customer relations
							- Long term accompaniment and maintenance of the equipment
CLEAR project	Various cities in Belgium, Italy, Spain, Portugal and The Netherlands	Belgium, Italy, Spain, Portugal and The Netherlands	- 01/03/2014 to 28/02/2017 - Closed (no information about the OSS)	Citizens	http://www.clear-project.eu/ https://ec.europa.eu/easme/en/news/want-reduce-your-energy-bill-save-money-interested-producing-and-consuming-your-own-renewable	Online tools, personal advice if needed, online community, peer-to-peer information, examples	Online tools, website, personal contact with consumers via information sessions, personal help desks, newsletters, building on established communities and channels at the consumer organizations
Retrofit Works	London	UK (national)	-2013 - running	Homeowners	http://retrofitworks.co.uk/ Email: info@retrofitworks.co.uk, Tel: +41 0330 123 1334	Online tool, office	n/a
CleanTech	Denmark	Denmark (national)	Probably closed (?)	Owners of single-family houses: -Houses with an oil-fired burner -Houses built before the first oil crisis of 1973	- http://successfamilies.vtt.fi/SF_D32_20121029F.pdf	-Dissemination of information: TV campaign -Motivation: Banks refer interested homeowners to Cleantech and can finance the project -On site visit -Follow-up: telephone, email	Dedicated personal assistance by advisors (one-point-of-contact)
Adsboll - Projekt Lavenergi	Denmark (no more precise information)	South Denmark, mainly Kolding (local/regional)	n/a, probably closed	-Owners of single-family houses, mainly those built in the 1970-80's -Mainly the area of Kolding in the region of south Denmark/Jutland	- http://successfamilies.vtt.fi/SF_D32_20121029F.pdf	-Dissemination of information in local newspapers, company website and separate pilot project website -Information on key partners website -"Open house" arrangement (pilot project) -Direct contact to existing customers in need of renovation	Dedicated personal assistance by advisors (one-point-of-contact), information disseminated about the service, follow-up
Be Reel!	Brussels	Belgium (national)	-Started in 2016 -Running	-4.1 million homes, representing 14% of the total GHG-emissions for Belgium in 2015	- Eddy Deruwe - Coordinator Be Reel! +0032 02 553 15 98 eddy.deruwe@vea.be	- Communication via energy bills - Promotion of BE REEL! On local, regional, national and EU forums - Belgian and international technical publication - Large scale marketing campaigns with tailored communication products	- Renovation advices as added service to existing local advisory services on housing/energy efficiency - Renovation advice in the subsector of social renting offices - Renovation advice services within the 5 provincial Advice Centres for sustainable housing - Renovation advice services within the Flemish IP-partner cities

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