



ComActivate

Enabling community action for energy sufficiency

D2.1 INVENTORY OF RESOURCE CENTRE MODELS AND TYPOLOGIES

Unlocking the potential of community-driven models to
drive residential renovation:
Insights from six case studies

April 30, 2024



Co-funded by
the European Union

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Project Acronym	ComActivate
Project Name	Enabling Community Action for Energy Sufficiency
Project Coordinator	Habitat for Humanity International
Project Duration	36 months
Website	

Deliverable No.	D2.1
Dissemination Level	public
Work Package	WP2
Lead beneficiary	Metropolitan Research Institute
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Reviewed by	Habitat for Humanity International
Date	30/04/2024
File Name	D2.1 Inventory of RC models and typologies

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Introduction

Resource Center (RC) is a key concept in ComActivate: it is an institutional entity that promotes and supports energy efficient investments and community engagement on a local level, connects various stakeholders in the pursuit of this aim - the local municipality, NGOs, SMEs and the residents - and provides advice on matters of energy efficiency to a broad range of actors, most importantly to residents and housing managers. The concept itself was introduced by ComAct, which defined it as a local institution that connects the community, technical and financial pillars of development in each of its pilots, and was responsible to carry out various tasks to engage local stakeholders and manage the processes of energy efficient interventions in condominiums. While ComAct oversaw the establishment of these RCs, ComActivate works to institutionalise them, to create a framework everywhere that ensures their sustainability.

The concept of resource centres is strikingly similar to that of the one-stop shops (OSS). Although nuanced differences can be discovered between the two ideas, these are due to the fact that both concepts are still rather fluid, and their meanings are not yet fixed. Importantly, as the idea of an RC was developed by ComAct, it corresponds more to the expectations of that project, hence there is tangibly a stronger focus on community development than for OSS due to the project's aims and general disposition about the need to work together with local MFABs residents. In practice, however, the differences tend to fade away as the tasks of resource centres and one-stop shops are adapted to local requirements and financing possibilities. As a result, in the following text the concepts are used interchangeably.

One-stops-shops are already quite widespread around the world, operating for different building types, and using diverse financial mechanisms, as shown by the snapshot from Krosse et al (2021) below (see Figure 1).

Figure 1. One-stop-shops around the world

company	founding year	country of origin	type of business model			market segment		
			OSS	NRS	IFS	single	multi	tertiary
Sustainable Australia Fund	2002	Australia			√			√
PACE	2008	USA	√		√	√	√	
EnergieSprong	2009	Netherlands	√			√	√	
Carbon Lighthouse	2009	USA		√	√			√
Metrus Energy	2009	USA			√			√
EcoHome Financial	2010	Canada			√	√		
Refresh Renovations	2010	New Zealand	√			√		
Sealed	2012	USA	√		√	√		
Retrofit Works	2013	UK	√			√		
Operene	2014	France	√				√	
Oktave	2015	France	√		√	√	√	
SiRE / ReformANERR	2015	Spain	√				√	
Factory Zero	2015	Netherlands	√			√		
Mon Carnet	2015	France	√			√		
Betterhome	2015	Denmark	√			√		
EuroPace	2018	Spain	√		√	√	√	
CleanBC Better Home	2018	Canada		√	√	√	√	√
EOS Energy	2019	Spain	√		√		√	
Business Energy Pro	2019	USA		√				√

Source: Krosse et al. (2021), explanation: Innovative Financing Schemes - IFS (initiated by government, financial institutions), or New Revenue Streams - NRS (tax reduction schemes, feed-in tariffs)

Thus, one-stop-shops are increasingly seen as important tools supporting a just energy transition, as demonstrated by the Energy Performance of Buildings Directive, which, among others, makes their establishment compulsory in each Member States "... for home-owners, SMEs, and all actors in the

renovation value chain, to receive dedicated and independent support and guidance”.¹ This political push towards the establishment of one-stop shops however is only the last in the series of actions both on local and regional level in many EU member states that, independently of the EU's legislative push, have already established OSSs or RCs.

It is precisely these examples the current deliverable aims to study. It aims to understand the various models employed, the legislative shapes these OSS can take and the financial mechanisms that can be used. An improved, well-contextualised understanding of these examples is essential for ComActivate as it seeks to support its pilot sites in calibrating the best possible working and subsidy mechanisms for their own RCs. Given the strong embeddedness of these initiatives into their own respective institutional and financial environments - much depends on the tenure structure, the subsidy system and how the banking sphere operates - it is not foreseen that the models can be transferred directly. Rather the analysis will serve as a brief compendium of possible ideas and models that can be replicated only if adapted to the local conditions.

As a result, the goal of the study is not to make a comprehensive EU wide study, but to pick informative examples with the possibility of lessons not only learned but directly transferred. As a result, the studied OSS models - all together 6 - were chosen after fulfilling specific criteria, namely: focus (at least partially) on condominiums, represent diverse geographical locations (including former Socialist countries, both bigger and smaller cities) and partially focus on energy poor households. Additionally, the models had to be inspiring, and at least - partially - adaptable in the ComActivate pilot sites.

Based on these considerations the following examples were chosen for a more detailed analysis:

- Oktave project in France, where a mixed-economy company offers services for condominiums and single-family homes;
- De Energiecentrale in Ghent, which is operated by the Ghent Municipality, and provides services for individual flats, single-family homes and condominiums as well;
- Opengela in Spain, which operates under the auspices of the Basque Energy Agency and provides services for multi-family buildings;
- Vilnius Renovation Agency, which is a public company operated by the Vilnius municipality and manages the energy efficient renewal of the condominiums in the city;
- Hauskunft, a public OSS operated by the Municipality of Vienna and providing a wide range of counselling services for interested condominiums, apartment owners and tenants;
- and, finally the Asenovgrad OSS in Bulgaria, which is operated by the local municipality and fulfils essential functions in running the local leg of the national subsidy program and engaging the homeowners.

While the selected cases showcase various organisational constellations, what unites them is the role of the public sphere: it has played an essential role everywhere, either in their establishment or their operation, or both. Purely SME run independent cases were not reviewed, due to the conviction that these would not be able to support energy poor households - an important target group for ComActivate - and the fact that all ComActivate pilots have important municipal actors on board.

Information was gathered mainly through desktop research, but this was supplemented by video interviews with selected local experts. The availability of information was slightly different for each case: language became a barrier and sometimes open source materials were less available, making us rely more on the interviews. Due to GDPR concerns however, we will not list the names and positions of people interviewed, at the same time we would like to thank them for the time spent and information provided.

In the following each of the selected cases are analysed. For every case the analysis is structured into three main parts:

- a brief listing of the basic data about the case,

¹ https://ec.europa.eu/commission/presscorner/detail/en/ip_23_6423

- a detailed explanation of its operation,
- an evaluation of its achievements.

Following the analysis the current deliverable closes with concluding remarks that provide a comparison between the different models and through this highlight their most innovative features and the lessons learned for the ComActive project.

Case analysis

Oktave – France

Basic data

Name: Oktave

Place: Grand-Est Region, France

Year of establishment: 2015

Main responsible actor: Oktave

Target building type: Individual homes and condominiums

Type of structure: mixed economy company

How does Oktave work?

Oktave was initially created to offer an integrated service for energy renovations of housing by the Grand-Est Region and Ademe (ADEME is a public industrial and commercial establishment - “Établissement public à caractère industriel et commercial”, or EPIC- , under the supervision of the Ministry for an Ecological Transition and Territorial Cohesion, Ministry for the Energy Transition and the Ministry for Higher Education and Research.) It was set up to meet the requirements under the Green Growth Energy Transition Act, according to which the housing stock needs to be at level BBC 2 by 2050 in France.

Oktave was founded in 2015 by the region with an initial capital of EUR 3 million, with which Oktave had to work with 200 individual households per year. In 2018 the plan was to reach 500 individual households a year over the next 5 years, until 2023. This meant Oktave had to triple its team. Oktave functions similar to an architecture company: its staff is highly knowledgeable about building technologies, renovation strategies, and energy audits. Oktave also has teams consisting of financial and legal experts, as well as communications and outreach teams. This allows the company to carry out all the work required - from initial customer acquisition to final sign-off - to be handled in-house.

Regarding financing, Oktave has received support from various sources. The Grand-Est Region raised capital and refinanced Oktave with up to 10 million a year. Grand-Est Region has also helped gain customers for Oktave, and has liaised with the other partners to offer financial capital for Oktave, as well as the financing offers for customers (individual households and condominiums). Since 2018, Oktave has operated as a Mixed Economy Company with the Grand Est Region, Procivis Alsace (representing the SACICAP-Treder of the Grand Est), the Banque des Territoires (CDC) and the Caisse d'Épargne Grand Est Europe. It receives financial support from the European Investment Bank (EIB). Currently it seems that they are a stand-alone market based business, where the condominium leg of the company is profitable.

The company is divided into two branches. One branch deals with individual households, the other with condominiums. These branches are completely separate, including different team members working on each branch. The individual household branch includes more activities than does the condominium branch, which stops once the majority of condominium owners have given their approval for the renovation works. For individual households, the clients are the owners of the family houses, and Oktave supports the owner from the first initial assessment to the finish of the work, including finding contractors and on-site quality inspections, as well as financing of the project. In this sense, Oktave operates like an architecture firm for the individual household branch. Due to the

² Comparing energy levels between countries is difficult, since each country does their own rating and assessment.

holistic approach, Oktave has full insurance, which means the whole work process, including quality or other issues, is under the responsibility of Oktave.

For condominiums, Oktave's clients are the property managers. After an initial assessment, the energy audits follow, and Oktave works on convincing the owners to get the work done, and creates energy and financing scenarios. Once the property owners hire architects and companies to do so, Oktave's work finishes and it is not responsible for the implementation or checking on the contractors' renovation work. However, Oktave still provides assistance to condominium owners, as shown in the graphic below (see Figure 2) under work stage 3. This means for condominiums, the architects are responsible for hiring contractors to carry out the work, while Oktave creates the energy and financing scenarios.

Figure 2. Different stages of renovation by Oktave

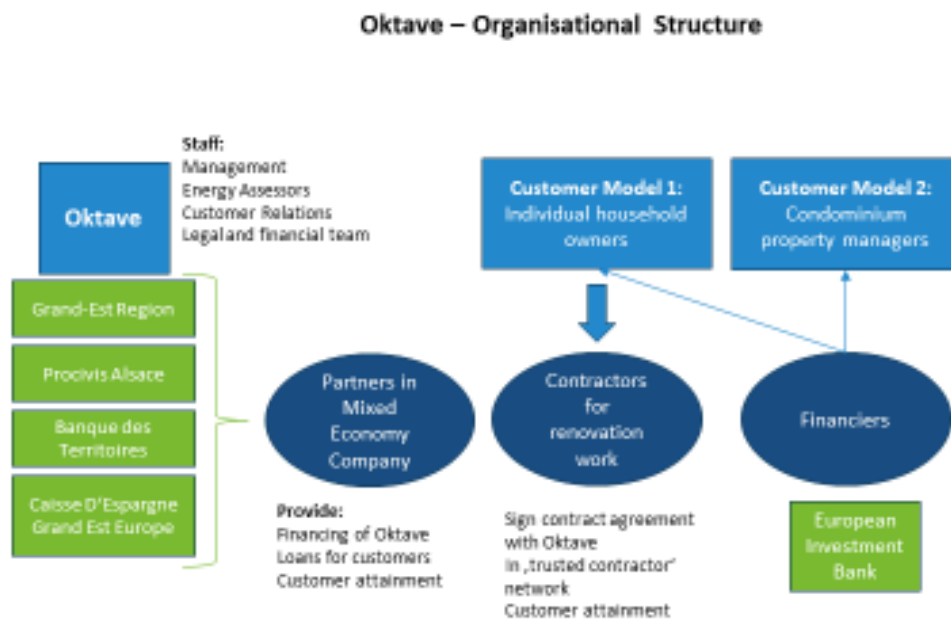
The different stages of an energy renovation project



Source: <https://www.oktave.fr/vous-etes-un-syndic/>

Regarding the specific contracts, Oktave works with property managers only in condominiums. But when it comes to convincing individual residents within a condominium, Oktave carries out all the communication work - this is their largest work effort regarding condominiums. Oktave creates an initial energy renovation plan that is tied to a financing plan, incorporating the financial situation of all residents. Such a plan might be translated for ComActivate and adapted to HOAs.

Figure 3 The organisational structure of Oktave



Source: Own figure produced by BPIE

Initial outreach to potential customers is conducted using a variety of different methods. Oktave works together with the municipalities, who suggest their services to residents. Contractors often refer people to Oktave for energy renovations (also because this means a potential new contract for them), and people who received energy renovations suggest Oktave to their personal networks. Where Oktave wants to establish itself in a new area with the Grand-Est region, the initial outreach is mainly focused on paid advertisements. Oktave estimates that when trying to establish the service in a new area, the first year the company has to focus almost exclusively on attracting customers (therefore creating a deficit), and only from the third year onwards can the service be profitable.

In both branches, the initial assessment is free, and from the energy audit onwards, Oktave charges for its work. Owners need to pay for the energy audits and whatever percentage of the renovation is not covered by national or regional subsidy schemes. Oktave does not charge construction companies (contractors) to be in their 'trusted' companies they suggest to homeowners. The contractors sign partner agreements with Oktave.

France offers many subsidies, such as loans or grants, to homeowners and condominiums for energy renovations. However, everyone still needs to pay a downpayment on the agreed work. Oktave can offer homeowners pre-financing up to 18 months (this is a revolving loan). Once homeowners receive the state subsidies, they can pay back the loan. However, it can take up to six months for homeowners to receive the subsidies, which is a hurdle for low-income households.

Evaluation of Oktave

Due to its establishment with the Grand-Est region and banks, Oktave has been able to secure funding and excellent financing options for individual customers from the beginning. The pre-financing loans to individual households are especially popular, creating a lot of demand for Oktave's services in the region. Oktave is the only one-stop-shop in France that is able to do this. While France has a legal requirement to renovate all buildings by 2050, low-income households are less likely to be able to afford renovations, whether extensive or small, this pre-financing option provides residents in the Grand-Est region with the ability to undertake an energy efficiency renovation.

For ComActivate the application of this model would mean that Resource Centres can reach out to banks (local, national, international) to see if similar partnerships for low-interest pre-financing loans can be created, thereby directly helping low-income residents. While this practice is still not functioning with condominiums for Octave, its development could be essential in the ComActivate target countries.

For Octave, one of the most important challenges lying ahead is about breaking into new geographical areas and securing the amount of capital required for outreach in these new areas. Renovations mean a great amount of disturbance to residents and trust in the workmanship and quality of the works carried out. Therefore, Oktave places a strong focus on creating a network of trusted contractors, and it is one of the keys to its success. Oktave is responsible for the quality control checks and final sign-off of renovations works and can therefore ensure for every project whether their contractors carry out high-quality work. This in-house management of quality control would be useful for ComActivate as well, especially in areas where trust in renovation contractors might be low, since residents will be less likely to carry out renovations if they feel they cannot trust in the quality of the work.

While Oktave's condominium branch is profitable, the individual homeowner branch is not yet able to exist without additional funding. Since both branches are managed by the same company, Oktave might be able to fund the individual homeowner branch through the condominiums, should there be no further funding available for the individual homeowner branch in the future.

The condominium branch can also rely on extensive subsidies, as shown below by Figure 4. The buildings in Reims were constructed between 1950 and 1970s and were renovated by Oktave, with grants covering almost 40% of the works.

Figure 4. Results of renovation in Reims



Source: <https://www.oktave.fr/renovations/renovation-energetique-copropriete-bastie-a-reims/>

Finally, in France, the energy efficiency requirements are very strict - the whole building stock needs to be renovated. This creates a sense of urgency which Oktave can use for its outreach activities as

well as funding requests. However, if the national policy or funding changes, this might change Octave's situation as well.

De Energiecentrale in Ghent

Basic data

Name: De Energiecentrale

Place: Ghent, Belgium

Year of establishment: 2014

Main responsible actor: Municipality of Ghent

Target building type: individual flats, family houses and condominiums

Type of structure: public

How does De Energiecentrale work?

De Energiecentrale (The Energy Hub) is a one-stop-shop for advice and guidance on increasing the energy efficiency of private homes, established in the City of Ghent in 2014. The renovation choices made by homeowners are supported by the OSS at crucial moments. The focus is on eliminating any concerns about energy renovation. The services are both for single family homes and for condominiums. The personal approach is key to providing appropriate services. The services the OSS provides are free of charge.

The main objectives of De Energiecentrale are to:

- provide customised advice based on a on-site visit resulting in a tailored step-by-step plan according to the home's characteristics and people's budget;
- assist energy renovations insofar as necessary: finding contractors, drawing up an invitation to tender, providing advice when tenders are compared, planning and monitoring the renovation works;
- ensure energy renovations are affordable by helping individuals to make use of the full range of financial support options offered by the City of Ghent as well as other government authorities;
- promote and support collective renovations.

De Energiecentrale was established by combining city budget, regional and European resources. The current budget of the OSS is around 4.2 EUR million per year and is a result of the expansion over the past seven years. The city budget is responsible for 3.2 EUR million, the regional Flemish government is responsible for 0.7 EUR million, and an ELENA project funded by the European Investment Bank (EIB) is covering around 350.000 EUR.

In terms of structure, De Energiecentrale is a partnership between the Environmental and Climate Service of the City of Ghent and REGent vzw, an NGO assuming the role of Flemish Energy Counter. Additionally, the renovation coaches of De Energiecentrale are a mix of their own staff and freelance energy experts coordinated by local Climate and Housing NGO.

Starting out, De Energiecentrale focused on three basic intervention types: roof insulation, windows replacement and energy efficient heating. The aim was to make this possible for a significant number of households by providing assistance with customised services ranging from once-only renovation advice, renovation consulting before and during renovation works and financial support to neighbourhood renovation and collective projects. After insulation measures were taken, the renovation coaches from De Energiecentrale encouraged and supported homeowners to introduce renewable energy sources for the remaining energy demand of their houses.

The OSS has a well-functioning homepage, that serves not only to distribute information but also allows visitors to sign up for free consultations, as shown by Figure 5.

Figure 5. De Energiecentrale's homepage advertising its functions



**Algemeen
renovatieadvies**

Kies dit advies wanneer je vooral vragen hebt over uiteenlopende renovatie-ingrepen en wil weten welke werken je best eerst doet.

De renovatiecoach bekijkt verschillende aspecten van je huis: de isolatie, de ramen, het verwarmingssysteem, enzovoort.



**Advies over hernieuwbare
energie**

Kies dit advies wanneer je vooral vragen hebt over zonnepanelen, een (hybride) warmtepomp, zonneboiler of warmtepompboiler.

De renovatiecoach kijkt onder andere of je woning hier al klaar voor is (bijvoorbeeld op het vlak van isolatie).



**Advies over groen en
water**

Kies dit advies wanneer je vooral vragen hebt over je huis en tuin vergroenen (bijvoorbeeld met een groendak) of over regenwater opvangen en recupereren.

De renovatiecoach bekijkt hoe je je woning kan wapenen tegen hitte, droogte en wateroverlast.

Source: <https://stad.gent.nl/de-energiecentrale/maak-een-afspraak-met-de-energiecentrale>

While clients need to register first, De Energiecentrale's staff goes directly into the citizens' houses to identify the problems and they provide personalised solutions according to the condition of the house, the available budget and the time necessary to implement the renovation. The OSS's activities and services are accompanied by information campaigns on energy efficiency and renovation benefits, making sure Ghent citizens are aware of the OSS existence and of what it offers.

An important concern for the De Energiecentrale OSS is energy poverty. To address it, De Energiecentrale uses a multilevel approach for supporting vulnerable households in lowering their energy bills. They started by making sure that vulnerable and low-income residents are aware of the existing renovation projects in their neighbourhood and facilitating their participation in these projects. Subsequently, they promoted and supported basic renovation measures to increase energy efficiency by means of customised renovation guidance. To successfully roll out a strategy for energy poverty alleviation, De Energiecentrale works closely with different social partners, such as Public Social Welfare Centre, Social Housing, and organisations such as Fluvius, which is the regulator for electricity and gas distribution for all Flemish municipalities.

Since the financial costs continue to be one of the main barriers in undergoing renovations, the city of Ghent has started an innovative revolving climate fund (i.e., a system that uses all repayments to reinvest in further loans), which offers loans with longer repayment periods and low interest rates (0% for the vulnerable target groups). These loans not only solve the pre-financing problem, but also make it possible to carry out more significant renovations, making the decrease in energy bills immediately visible. The available Flemish subsidies are used for partly paying back the loan, so that monthly instalments can be lowered.

To promote and support collective renovation projects, De Energiecentrale supports groups of citizens who are interested in carrying out renovations in their neighbourhoods. Help is provided to them to set up group purchases and assist them in convincing their neighbours to join. De Energiecentrale has also established a program to support the association of co-owners in condominium buildings. It provides information on financial sources and helps in applications. There are different subsidies, energy bonuses, VAT discounts available in Ghent (a subsidy like the one that has to be paid back when the unit is sold or inherited). Some of the bonuses are targeted to low and middle income families.

Evaluation of De Energiecentrale

De Energiecentrale has understood that undertaking energy renovations for condominiums is often complex and requires a different approach. Renovation in a block of flats may require a little more energy: from convincing neighbours, setting priorities and preparing files for the general assembly to finding contractors, comparing quotations and following up on the renovation works. This is why the De Energiecentrale OSS works with specialised renovation coaches for flats. Furthermore, the OSS collaborates with different NGOs to cover various areas and topics for which it might not have the necessary expertise. The OSS activities aimed at associations of co-owners and property managers have been expanded by supporting and accelerating collective decision-making.

The OSS's activities can be regarded as very successful. Since its establishment in 2014, it has expanded the range of services provided and currently is offering an average of 1,000 customised advice sessions and 400 renovation consultations annually. Between 2014 and 2019, De Energiecentrale's approach resulted in 30 EUR million investments in home renovations and 660 new jobs created in the construction sector. In addition, many citizens have made their homes more energy efficient and an annual total of 1.2 EUR million was saved on energy bills, the equivalent to 5,800 tons to CO₂ emissions a year.

Future proofing is also high on the agenda of De Energiecentrale. As more people have become aware of the necessity of insulating their homes, the OSS aims to expand towards guiding citizens through reaching zero emission buildings and go beyond energy efficiency measures. In addition to addressing energy use aspects, the renovation coaches of De Energiecentrale are also committed to incorporate in their package adaptation issues. Homeowners are also encouraged and supported to find ways to retain rainwater, opt for green roofs and facades as well as pay attention to cooling infrastructure and noise pollution.

OPENGELA IN THE BASQUE COUNTRY

Basic data

Name: Opengela

Place: The Basque Country

Year of establishment: 2019

Main responsible actor: Basque Government, Basque Energy Agency

Target building type: multi-family apartment buildings

Type of structure: public-private collaboration

How does Opengela work?

Opengela (<https://opengela.eus/en-2>) is a project driven by the Basque Government which aims to improve the quality of life in cities through urban regeneration. It consists of the creation of neighbourhood offices (one-stop-shops) that provide advice and support to the community throughout

the whole renovation process. The one-stop-shop (OSS) is targeting individuals and communities of homeowners who want to renovate their apartment buildings, aiming to actively involve and make them part of the renovation process.

Opengela is an example of public-private collaboration. In addition to the Basque Government there is Basque Energy Agency (EVE), Bilbao Municipal Housing, Debegesa, as well as two European-level bodies (FEDARENE and Housing Europe) and the private sector is represented by three firms specialising in financing (GNE Finance), communication (Gabineteseis) and European affairs (Zabala). The Bilbao Municipal Housing and Debegesa developed two pilot OSS and their associated intervention areas. As private entities, GNE Finance and Zabala provided the consortium with expertise in new financial models and instruments, as well as technical, social and legal expertise.

In its initial phase, Opengela started with two pilot projects, with the aim to replicate this model in other Basque towns and in other countries in Europe. In each case it worked with individual homeowners, but refurbished entire condominiums.

The first pilot project took place in the Otxarkoaga district located on a hillside in the northeast of Bilbao. Initially built as a small town during the industrial expansion of the 1960's in Biscay, the district has seen several rehabilitation initiatives being carried out since the 1990s to tackle multiple social and economic issues. Most multi-family properties are owned by the municipality and are allocated for social housing. The accessibility of the area was poor due to the topography and the distance to downtown Bilbao, which was a challenge for Otxarkoaga's ageing population. The district also accommodates a high percentage of Romani people and others in social exclusion (characterised by low income, high unemployment levels). Building construction was of poor quality and ill-maintained. In Otxarkoaga, 238 apartments in 15 condominiums were selected to be renovated based on the following criteria: (1) vulnerability status (unemployment, level of income, age, building stock age and lack of accessibility); (2) the ratio of households in social rental housing and (3) homeowners' needs.

Figure 6. Renovation results in Otxarkoaga

»» OTXARKOAGA, BILBAO



Source: <https://opengela.eus/>

The second pilot project was carried out in the Txonta district, located in Eibar (province of Gipuzkoa, Basque Country). This district is situated in a valley, removed from the city center. A typical housing block in Txonta is 4-storey high, where the majority of residents are homeowners. Its urban development was a consequence of the heavy industrial expansion during the 1950-1960s. Since the 1970s, due to the economic crisis and industrial decline, the population decreased as they chose

other places to live. In Txonta, a total of 187 homes in 15 buildings were renovated through the OSS set there.

Figure 7. Renovation results in Txonta

 TXONTA, EIBAR

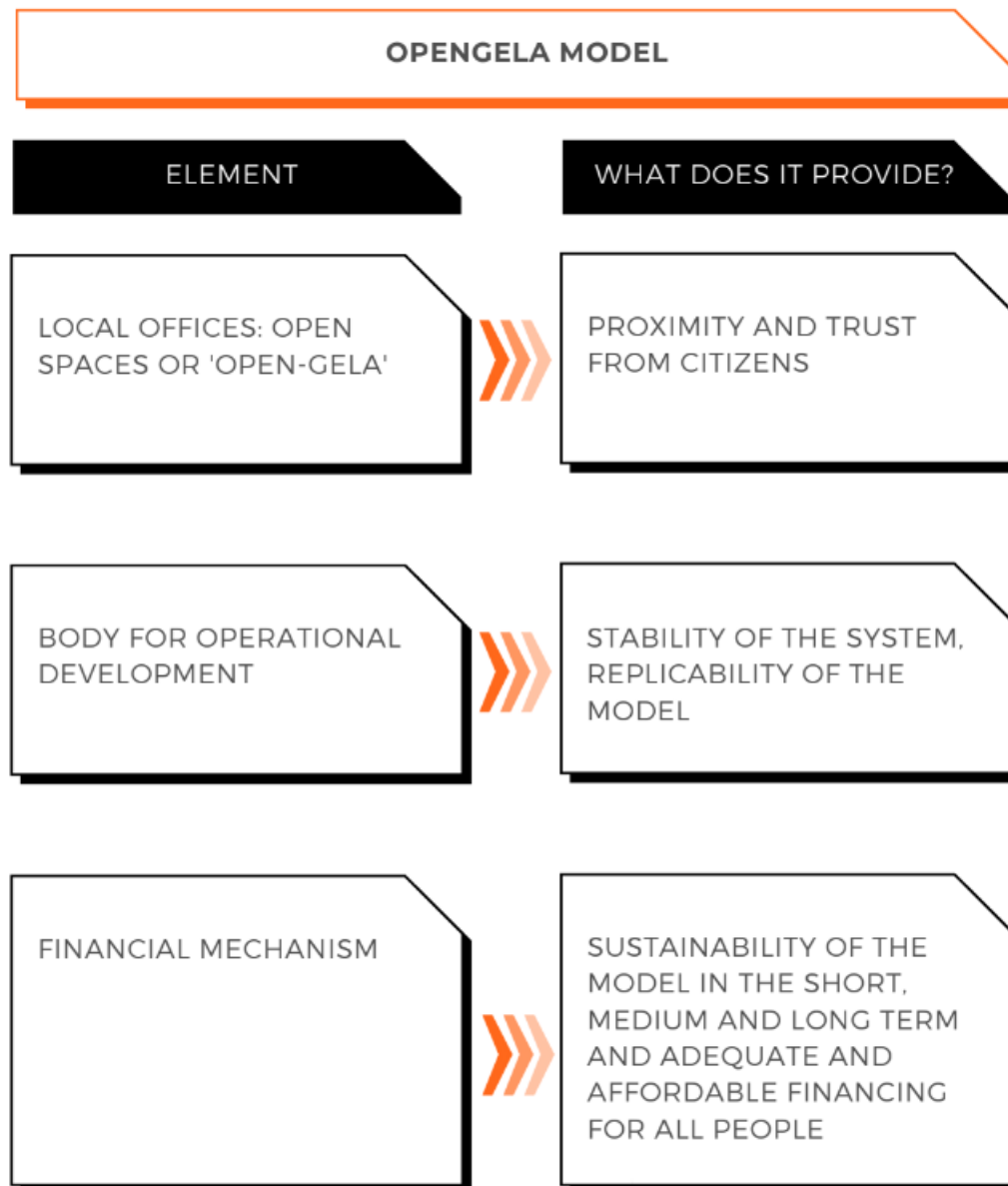


Source: <https://opengela.eus/>

The OSS provides free of charge support on the technical, operational, administrative, financial and social aspects of home renovations. To this end, the OSS collaborates with social workers and building renovation professionals. Additionally, the office staff play an active role in building trust with the homeowners. They have organised several meetings, face-to-face or over the phone with each

owner to explain the renovation process step-by-step and the benefit of each renovation aspect. In this way, the OSS tries to actively engage and make individuals a part of the renovation process, which is a crucial dimension of the Opengela OSS model, which is seen below (Figure 8).

Figure 8. The Opengela model



Source: <https://opengela.eus/>

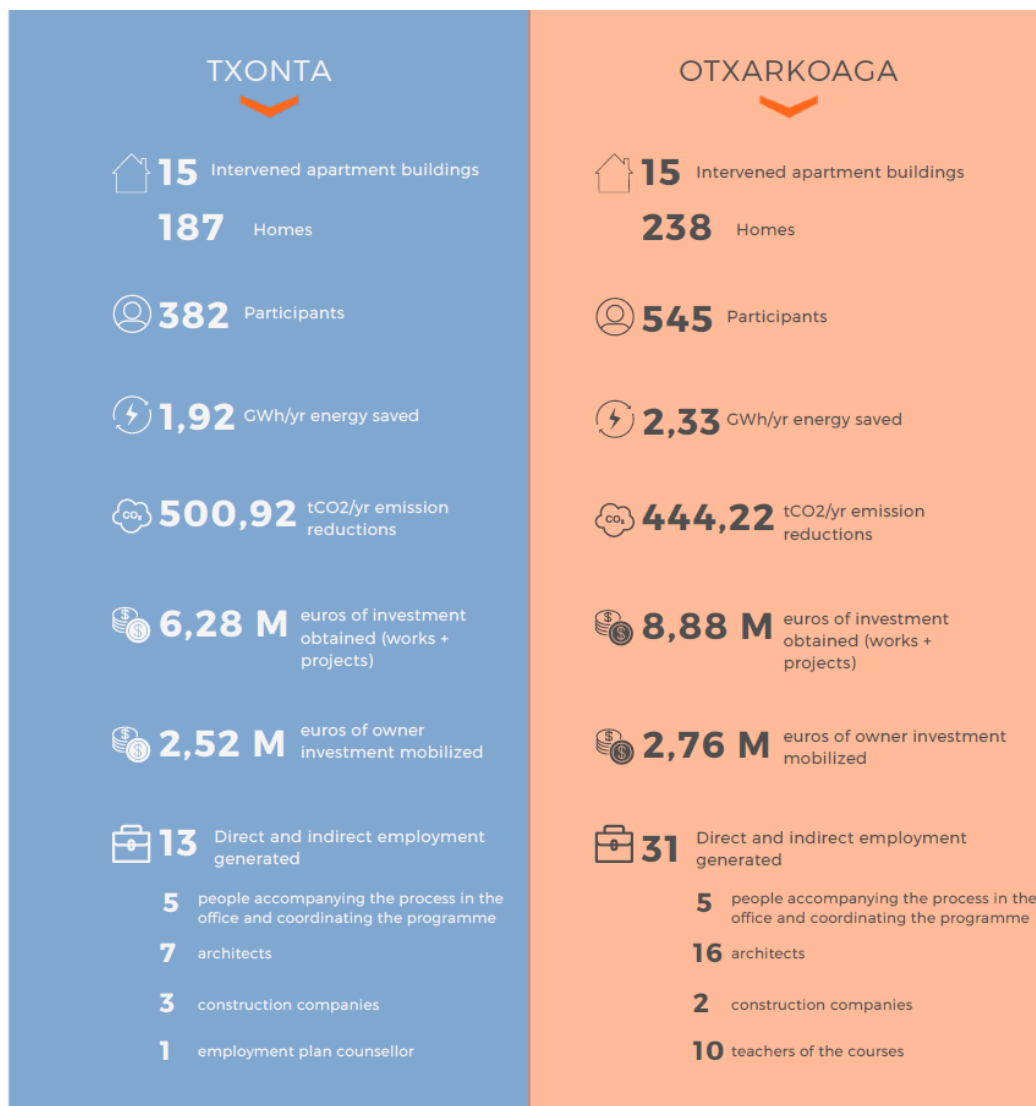
Born out of the premise that the income and repayment capacity levels of a great share of the population was too low to access ordinary bank loans and could only access subsidies or high-interest rate credits, the 'MAS OPENGELA' mechanism (Social Support System Fund), which is a mix of public and private funds, offers loans refundable in 15 years to help those low-income households cover the full investment needed for the renovation of their homes. The financing process is quick and easy, with no linkage to life insurance and a nominal interest rate of 5.95% or 6.45% depending on energy efficiency improvement ambition.

The cost of an individual renovation project ranges from €5,000 to €70,000 based on the work needed. On average, the initial investment is about €40,000 and the payment capacity ranges from €40 to €500 per month. The OSS assesses each case (including the risk of default payment) and individualised solutions are proposed to each household, based on their specific situation.

Evaluation of Opengela

The project produces an economically viable business model that brings together active citizen engagement and an innovative financial instrument, making it suitable for vulnerable populations. Additionally, by now the project has set up neighbourhood offices (OSS) in 10 cities of the Basque Country: Otxarkoaga (Bilbao) and Txonta (Eibar) and in Durango, Lasarte, Pasaia, Abanto-Zierbena, Santurtzi, Valle de Trápaga, Orduña and Amurrio. Furthermore, other 14 neighbourhoods are in the early stages of roll out. Nearly 1000 people were supported in the refurbishment of their buildings which led to the refurbishment of 469 households/individual houses. The average energy saving per dwelling exceeds 60%. For the cases of Txonta and Otxarkoaga alone the numbers are also impressive. Not only was more than 4 GWh/year energy saved, but significant present of private funding was mobilized and 44 new employment opportunities were created, as shown below (Figure 9).

Figure 9. Results from Opengela



Source: <https://opengela.eus/>

The project has also been exemplary in establishing public and private partnership, in which the public side facilitates the implementation of the offices so that the private side can carry out the renovation work and investment. This structure has helped also identify and overcome regional-local collaboration barriers inherent to home renovation services. Various firms were also mobilized, in the fields of financing (GNE Finance), communication (Gabineteseis) and European affairs (Zabala). As private entities, GNE Finance and Zabala provided the consortium with expertise in new financial instruments, as well as technical, social and legal expertise.

In terms of financing, the Opengela financial solution has facilitated the uptake of building renovation in vulnerable areas without compromising the debt level of communities. On average, applicants allocate 26.20% of their income to cover debts with banks, which allows a low margin of debt to deal with financing. At the end of the project, a total of €5,288,446 private investment was mobilised in Txonta and Otxarkoaga alone.

It is interesting to note that energy efficiency was not the main reason why households agreed to undergo renovation. Accessibility and safety considerations were the main factors in the decision-making process. Adding an elevator and updating the entry door systems are features that immediately improve people's lives, equally important are the renovation works targeting energy efficiency measures that have multiple benefits i.e., better comfort, productivity, healthy environment etc. for the buildings' inhabitants.

Vilnius City Building Renovation Company

Basic Data

Name: Atnaujinkime miestą

Place: Vilnius, Lithuania

Year of establishment: 2007

Main responsible actor: Municipality of Vilnius

Target building type: privately owned condominiums

Type of structure: public

How does Atnaujinkime miestą work?

'Let's renovate the city' (Atnaujinkime miestą; Amiestas in short) is a one-stop shop that was established in 2007 by the municipality of Vilnius to assist Home Owners' Associations (HOA) to apply for the state funds for energy efficient refurbishments. It is a 100% municipally owned non-profit organisation. Until 2019 the organisation operated as an information centre that helped those property managers of MFABs who entered the office to be able to put together their application for the state fund and to be able to implement the renovation process. As in 2019 the number of renovated buildings was still very low in Vilnius, a complete paradigm change was carried out in the operation of the OSS.

The change of the paradigm was based on the observation that initiating the renovation, convincing the owners, preparing the application documents, implementing the public procurement, implementing the renovation and monitoring the process are very complex tasks that are far beyond the capabilities of property managers, even if many of them are professionals. In addition, the changing regulations created another hurdle, which is difficult for experienced professionals as well. While for successful applications the state subsidy covered the costs of property management up to EUR 5/m², this was not enough to convince property managers to engage in this. As they were not motivated and not capable of starting the process, the number of renovations in the capital was extremely low compared to other cities of Lithuania.

In 2019 the municipality agreed to put much more emphasis on supporting HOAs in the renovation process and took a proactive approach. The number of employees of the OSS was increased and it practically took over the role of the property managers free of charge. As a result, the OSS carries out all the steps of the renovation:

1. It approaches communities and convinces the owners to implement the renovation;
2. It works out investment plans;
3. It prepares the application documents;
4. It implements the public procurements for renovation;
5. It monitors the renovation process;
6. It evaluates and checks the results and makes the necessary energy audits.

The activities are implemented in phases: the state renovation calls are open for a few months, during which the OSS actively recruits buildings and prepares the applications. When the calls are closed the OSS concentrates on the implementation of the projects.

Importantly Atnaujinkime miestą has become very proactive: it does not wait for the representatives of the HOAs to enter the office, rather approaches the communities through direct events. Then it looks for the informal leaders of the community to convince the other owners. Formerly representatives of the OSS participated in several general assemblies as a result of requests from HOAs, but often very few people showed up. As a result an internal decision was made that even the first meeting should be much better prepared and the HOA members should have initial information in advance.

Recently Atnaujinkime miestą has obtained additional funding to organise monthly meetings with community leaders and managers. They inform them about new financial and technical solutions. The leaders of the OSS claim that their primary activity is “sales”, to find the proper buildings and convince the owners about the renovation. They have a staff of 34 employees covering a broad range of professions (e.g. lawyers, engineers, procurement specialists, administrators, sales persons). Nevertheless, five or six activities, like the elaboration of the investment plans or controlling the renovation process and the results are outsourced.

The costs of the OSS are covered by the municipality of Vilnius in about 70%, while about 30% comes from the state based on the fees covered by the state run renovation fund - EUR 5/m² management fee and coverage of documents, like the investment plans (EUR 2000/plan).

Besides pure renovation, the OSS has the aim of creating new urban building quality, thus encouraging investment into the architectural quality, which naturally comes with higher costs about which the owners have to be convinced.

Figure 10. Refurbished building complex in Vilnius



Source: <https://amiestas.lt/>

It is important to emphasise, that the OSS assists only multi-family apartment buildings (MFAB), family houses do not belong to its portfolio. (Most probably due to the lack of subsidies for family houses.) The current subsidy scheme provides 30% non-refundable grant to MFABs for insulation and interventions in the electronic systems (tied to a certain level of energy saved), while 50% is provided for the upgrade of the heating system. The state also finances certain costs (like investment plans and management fees up to a certain amount) in 100%. In addition, the non-refundable part is covered by a preferential state loan. The OSS only works with this subsidy programme and does not provide complementary funding.

Evaluation of Atnaujinkime miestą

In Vilnius, the city has a renovation programme that includes about 800 residential buildings. In the application process, buildings selected from the list are based on a territorial preference: those areas are preferred where the renovation process is already advanced, thus easier to reach a neighbourhood level result. Also buildings with less affluent owners and buildings with a high potential savings are preferred. In case a neighbourhood reaches a certain level of renovation rate, interventions in the public spaces are also implemented by the OSS (like improving the green areas or fixing the broken street furniture).

The paradigm shift in the OSS's work was very successful. Only after 1,5 years it already initiated about 100 projects, and by now the number of completed and running projects are about 130. (Nevertheless, it seems that only 2% of the MFAB housing stock is renovated in the capital, which is far from the national average of 12,4%.) In the framework of the neighbourhood renovation programme the OSS also manages about 60-70 projects.

As a result, Vilnius became the first from the last regarding the number of applications to state funding countrywise. The figure below (Figure 11) summarises the main success factors behind the operation of the Vilnius OSS, based on its self-evaluation

Figure 11. Key factors in getting HOAs on board in Vilnius



Source: Presentation of [Lina Bubulytė](#) on the Vilnius OSS

So far the political consensus behind financing and cooperating with the Atnaujinkime miestą is stable, and its basic operation costs are not questioned despite being substantial. On the other hand it is not easy to attract the needed staff in the capital as salaries of the OSS are not competitive enough. That is why additional activities (e.g. participation in European research projects or generating ELENA projects) are already being implemented. There are also a lot of inquiries from other municipalities to extend the field of activities of the OSS to other cities, however the current leaders consider that local agencies should rather be set up, as each location has a different situation to cover (e.g. in Vilnius there are a lot of private tenants while in other cities owner occupation is more important).

The experiences of the Atnaujinkime miestą are extremely beneficial for the ComActivate project, as it works with privately owned multi-family buildings, emphasising the importance of working with the communities as the major success factor to accelerate the renovation process. It also sets two major paradigms for the operation of OSS: 1) the assumption that property managers are not capable of initiating and implementing such a complex process themselves, and 2) public funds in great amounts are essential to achieve public goals successfully.

Hauskunft Wien

Basic data

Name: Hauskunft

Place: Vienna, Austria

Year of establishment: 2021

Main responsible actor: Municipality of Vienna

Target building type: apartments, apartment houses in various ownership structure,

Type of structure: public

How does Hauskunft work?

The Hauskunft service center was established following a piloting period by the RenoBooster project, which was a Horizon 2020 project that ran between 1 May 2019 - 31 October 2022 (https://www.e-sieben.at/de/projekte/18058_RenoBooster_Smart_Renovation.php). After the piloting phase Hauskunft has been run and maintained by the Viennese City Municipality, more precisely it forms part of the Wohn-Fonds Wien. The Fond is a non-profit organisation that acts as a coordinating body between property developers, homeowners and municipal departments with the aim to support housing construction and urban renewal in Vienna (<https://www.wohnfonds.wien.at/>).

The housing context is very particular in Vienna, with a very high share of municipally owned buildings and a strong local housing policy that regulates private renting - especially in the stock built before 1945. The city has a complex housing subsidy system that increasingly concentrates on supporting the decarbonisation of its housing stock, and provides an increasing palette of financial support schemes and services³.

As explained in the final report of the RenoBooster project (RenoBooster, 2022), the concept of Hauskunft was developed as a service and counselling hub, while parallel for practical implementation issues of project execution a separate platform was provided (<https://www.xn--qualittsplattform-sanierungspartner-b7c.wien/>). Hauskunft was established in a close physical proximity of the Vienna City Administration in order to make the reach of additional services for owners easier. The test stage of Hauskunft ran from October 2020 to March 2021, after that Hauskunft became part of [wohnfonds_wien](https://www.wohnfonds.wien/).

Hauskunft's focus has become to provide advice for all questions related to refurbishment in and around buildings or dwellings, making these fit for the future. The latter means the necessary physical and technical upgrades to support Vienna's ambitious climate aims. In order to accelerate this transition to climate neutrality Hauskunft currently offers different types of services, all aimed at making refurbishment easier and more transparent for the residents of Vienna. The services are tailor made and provide a broad range of different counselling types that support the decision making mechanisms, provide contacts and help finding the appropriate subsidies. In this sense Hauskunft is an ideal interlocutor that connects various stakeholders active in the field of renovation.

Currently, Hauskunft offers concrete counselling services (by phone, in-person, virtually and when necessary on-site) free of charge. There are many different services it offers, but they can be grouped into two categories: 1) the provision of advice and recommendations and 2) outreach activities to supply information. In practice this means:

Regarding the provision of advice and recommendations:

1. Expert advice for orientation:

The experts at Hauskunft advise anyone interested in renovating a building in Vienna. Owners of owner-occupied flats, owner-occupied homes and apartment blocks receive free orientation advice before and during the planning of their refurbishment. Architects, planners and property managers are also welcome to receive advice. This consultation does not include a written protocol, calculations or cost estimates.

2. Refurbishment recommendations: "Future check for the buildings"

Hauskunft experts provide specific, customised decision-making support for the renovation of a building. For a comprehensive refurbishment including insulation Hauskunft experts can be asked to

³ Verordnung der Wiener Landesregierung über die Gewährung von Förderungen im Rahmen des II. Hauptstückes des Wiener Wohnbauförderungs- und Wohnhaussanierungsgesetzes – WWFSG 1989 (Sanierungs- und Dekarbonisierungsverordnung 2024)

go on site. The final result of such a support is a report with recommendations for the refurbishment. Calculations and cost estimates are not included.

3. Promotion of a refurbishment concept of a building:

A comprehensive renovation concept is at the heart of how planning should be carried out. Subsidised by the City of Vienna, Hauskunft offers advice on the preparation of refurbishment concepts and provides review of submitted refurbishment concepts.

Regarding outreach activities to supply information:

4. Information evening for homeowners at the Hauskunft

There are dedicated information evenings once a month for homeowners thinking about refurbishing their homes.

5. Internet-based information supply system

Hauskunft's homepage is embedded into the well-connected webpage system of the City of Vienna and Wohn-Fonds Wien. This is already a great help. However, through Hauskunft's website best practices are introduced, as well as a detailed list of professionals, who offer high quality services guaranteed by Hauskunft. The detailed platform was also piloted during the RenoBooster project. Importantly, the listing does not concentrate on implementers, but provides support for the planning phase of the renovation as well. Additionally, besides the listing of service providers and specialists, the webpage also shows previous examples (see Figure 12).

Figure 12. Layout of the platform



← → ↻ 🔍 qualitätsplattform-sanierungspartner.wien

DIE QUALITÄTSPLATTFORM SANIERUNGSPARTNER

Wer ein Wohngebäude zukunftstauglich sanieren will, braucht kompetente Partner.
Diese neugeschaffene Plattform zeigt Beispiele und Leistungen von Anbietern mit
speziellen Qualitätsansprüchen.
Gebäudeeigentümerinnen und Hausverwaltungen finden so geeignete Partner für ihr
Sanierungsprojekt.

<p>Beispiele</p> <p>Gelungene Sanierungen zeigen die Vielfalt der Möglichkeiten. Hier gibt es einen umfassenden Überblick, mit Schwerpunkt Zukunftstauglichkeit: Sanierungen mit Passivhaus-Komponenten, Einsatz Erneuerbarer Energie, Kühlung, Begrünung u.v.m. Projektbeschreibungen mit Daten und Fakten sowie Angaben zu den Planerinnen und Professionistinnen.</p> <p><u>MEHR ERFAHREN</u></p>	<p>Planung</p> <p>Ein notwendiger Heizungstausch ist oft der Anlass über eine Sanierung nachzudenken. Im Sanierungskonzept werden die Möglichkeiten erkundet und Entscheidungsgrundlagen geliefert, in Wien gibt es eine Förderung dafür. Ihre Sanierungspartner finden Sie mit den Steckbriefen für die Bereiche Architektur, Spezialplanungen (Beschattung, Feuchtesanierung), Gebäudetechnik und Begleitung.</p> <p><u>MEHR ERFAHREN</u></p>	<p>Ausführung</p> <p>Ausführende Unternehmen für die Althaus-Sanierung mit besonderen Qualitätsansprüchen finden Sie hier in Listen einschlägiger Qualitätsvereinigungen: Wärmepumpe, Photovoltaik, Erdwärme, Solar, Biowärme, Wärmedämmung, Bauunternehmungen die sich explizit zu unserer Charta bekennen, präsentieren ihr Leistungsangebot.</p> <p><u>MEHR ERFAHREN</u></p>
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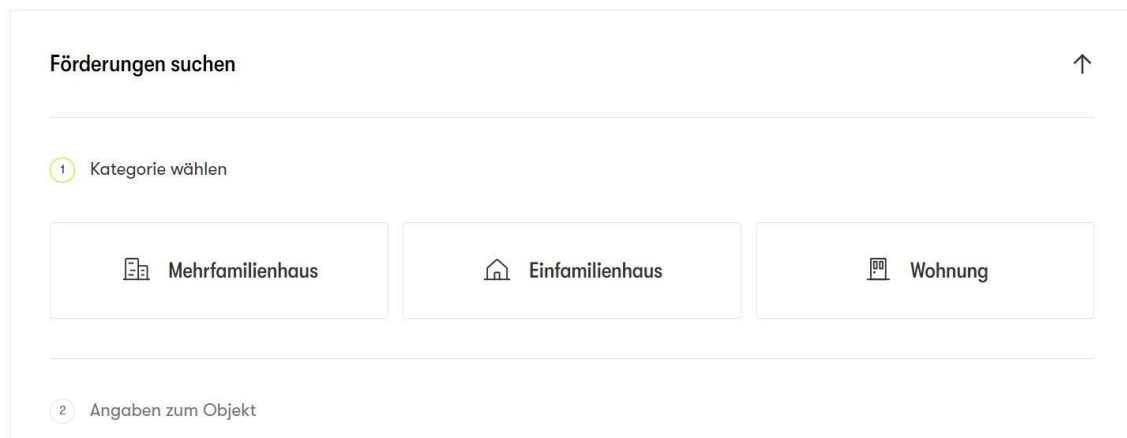
Source: <https://www.xn--qualitätsplattform-sanierungspartner-b7c.wien/>

Hauskunft's website allows users to navigate to the detailed list of grant schemes available to support the energy efficient refurbishment of buildings and homes. This easy to use system, as shown below by the subsequent pictures, supports users in finding the available subsidy schemes just in three steps in a transparent way.

It first directs users to choose the appropriate building type:

Figure 13. Step 1

Wenn Sie Ihr **Wohnhaus** oder Ihre **Wohnung** sanieren möchten, steht Ihnen ein umfangreiches Förderangebot zur Verfügung. Finden Sie hier mit wenigen Klicks die richtige Förderung für Ihr Anliegen.



Förderungen suchen ↑

1 Kategorie wählen

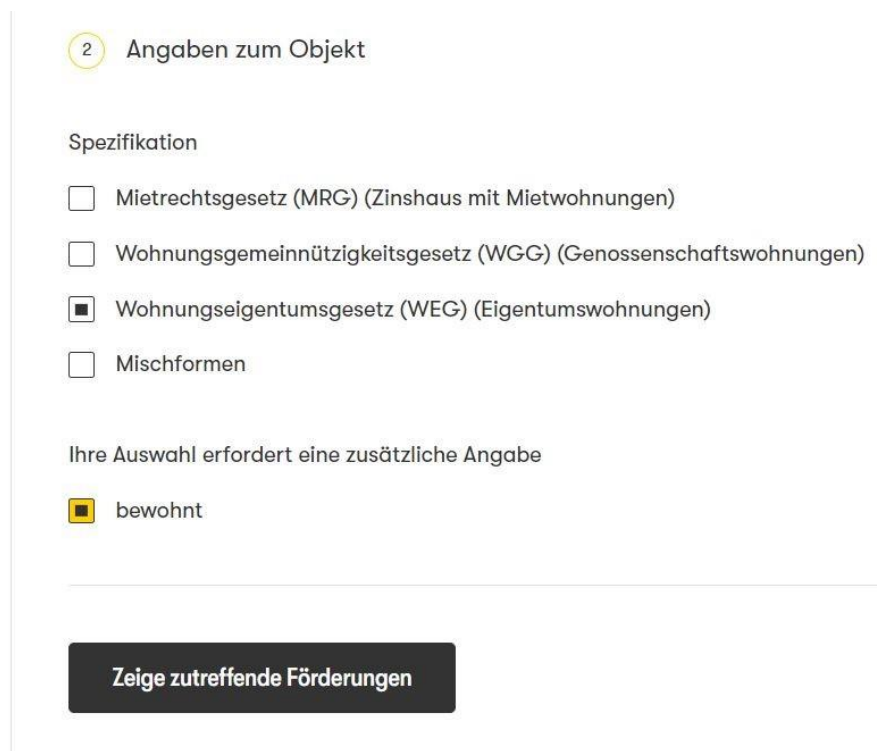
Mehrfamilienhaus Einfamilienhaus Wohnung

2 Angaben zum Objekt

Source: <https://www.hauskunft-wien.at/foerderportal>

Then specifies the tenure structure:

Figure 14. Step 2



2 Angaben zum Objekt

Spezifikation

Mietrechtsgesetz (MRG) (Zinshaus mit Mietwohnungen)

Wohnungsgemeinnützigkeitsgesetz (WGG) (Genossenschaftswohnungen)

Wohnungseigentumsgesetz (WEG) (Eigentumswohnungen)

Mischformen

Ihre Auswahl erfordert eine zusätzliche Angabe

bewohnt

Zeige zutreffende Förderungen

Source: <https://www.hauskunft-wien.at/foerderportal>

And finally lists all the available subsidies that are provided either by the city itself or by the national level.

Figure 15. Step3

25 Förderungen gefunden

Gebäudesicherheit

Landesförderung Wien

Barrierefreiheit und Gebäudesicherheit

wohnfonds_wien, MA50

Begrünte Gebäudeflächen

Landesförderung Wien

Dachbegrünung

GB*/MA22

Landesförderung Wien

Fassadenbegrünung

GB*/MA22

Landesförderung Wien

Innenhofbegrünung

GB*/MA22

Dämmung (therm. Optimierung der Gebäudehülle)

Landesförderung Wien

Dämmung der Gebäudehülle

wohnfonds_wien, MA50

Bundesförderung

Sanierungsbonus

Umweltförderung Kommunalkredit Public Consulting

Dachgeschoss (Ausbau / Innenausbau)

Landesförderung Wien

DG-Ausbau

wohnfonds_wien, MA50

Themenfilter

- Gebäudesicherheit
- Begrünte Gebäudeflächen
- Dämmung (therm. Optimierung der Gebäudehülle)
- Dachgeschoss (Ausbau / Innenausbau)
- Mobilität
- Fenster / Fenstertüren
- Haustechnik
- Wohnkomfort
- Sanierung, umfassende
- (Teil-)Abbruch

Source: <https://www.hauskunft-wien.at/foerderportal>

Evaluation of Hauskunft

Hauskunft is still a very young endeavour, thus a detailed evaluation is definitely not possible at this stage. However, there are many observations that can already be made.

First of all, Hauskunft is a rare example of a project that was successfully piloted with the help of European funding, then kept and integrated into the existing institutional system. This was made possible through the decision of the City of Vienna that passed a resolution in May, 2021 about supporting Hauskunft in the coming years.

As mentioned already, Hauskunft was piloted as the RenoBooster project - this was conceived as part of a series of EU funded projects that were also supported in other EU countries - with the aim to streamline support for building owners to renovate. The underlying concept was to bring together all stakeholders in one place and offer a comprehensive solution, encompassing consultation, financial services, and legal and technical expertise. The greatest achievements of RenoBooster was undoubtedly the establishment of the "Hauskunft" advice centre and the quality network of providers

of relevant services "Quality Platform Renovation Partners Vienna", both of which have been introduced above.

Another important result was the networking of various stakeholders, i.e. the project partners, who had not previously worked together in projects in this way. This networking also has a lasting effect and produces concrete results in good time. It was also important to build up knowledge within the city, as the studies and analyses that were developed as part of RenoBooster were incorporated into the city's ongoing legislative and other programme-related work (Redevelopment and Decarbonisation Ordinance 2024).

In some cases, the results and findings from RenoBooster led to further projects and programmes of the City of Vienna or were incorporated into them. For example, as part of the WieNeu+ urban renewal programme and the "Da geht no was" project: <https://wieneuplus.wien.gv.at/> and <https://wieneuplus.wien.gv.at/da-geht-no-was> It was not insignificant to utilise and "collect" the EU funding in a targeted manner.

During its implementation a particular focus in the implementation of the RenoBooster project was the coordination of different, sometimes contradictory interests represented by different stakeholders, such as the interests of tenants in maintaining affordable housing and those of landlords/owners in acting economically from their point of view. As a result a broad-based project team was therefore put together in advance to involve the various stakeholders in order to provide a forum for dialogue between the different interests. Originally four counsellors worked in Hauskunft, but they could rely on the support of wohnfonds_wien and DIE UMWELTBERATUNG.

Importantly, the development of Hauskunft was supported by extensive research activities to map residential and stakeholder demand and build a service that answers to these. Workshops, focus groups and interviews were made on a very large sample among the residents that have led to some eye-opening results. Among these was the realisation that refurbishments are mostly carried out because they are deemed necessary or they provide higher comfort level, and concerns about climate and energy were not so relevant. (This changed as the project progressed and external events like Russia's war on Ukraine took center stage.) The research also showed that lack of knowledge and trust as well as financial risks really decrease people's willingness to renovate. (Hence the services of Hauskunft really try to overcome the latter difficulties.)

Furthermore, a differentiated analysis of the situation from a technical and legal perspective, also helped to set up Hauskunft in a successful manner. Among others the opinion research institute SORA conducted a well-founded survey and developed a communication strategy. Finally, a last aspect that should not be underestimated is that the project team created and practised a trust-building project culture that made solution-oriented work possible in the first place.

OSS Asenovgrad

Basic data

Name: OSS Asenovgrad

Place: Asenovgrad, Bulgaria

Year of establishment: 2022

Main responsible actor: Asenovgrad municipality

Target building type: condominiums

Type of structure: public

How does the OSS Asenovgrad work?

Established in 2020-2021, and in operation from 2022, the one-stop-shop serves primarily as a multi-functional technical support office, which belongs to the municipality. Its main aim is to support local Multi-Family Apartment Buildings (MFABs) to organise themselves, to submit applications for the National Programme for Energy Efficiency of Multifamily Residential Buildings and to carry out the refurbishments.

Until the end of 2023 the OSS was financed by the Up-Stairs project, which was an EU financed Horizon 2020 project between 2020 and 2023 that aimed at accelerating collective action and setting up energy communities (For details see <https://www.h2020-upstairs.eu/>). The OSS in Asenovgrad has five employees, all with various competences, including a background in legal, economic, technical and financial fields. The employees are all former workers of the municipality, who were selected by the deputy mayor and received training to become OSS workers. Originally called as Implementation Champions - a definition by the Up-Stairs project - their training was also financed by the project itself. Taking into account the Bulgarian context, besides a number of energy-focused, organisational and economic issues, the training also included legal issues and soft skills, to facilitate joint decision making within MFABs, a singularly difficult task in Bulgaria.

Figure 16. Advertising the OSS on the Up-Stairs website

Asenovgrad Municipality provide advice and support to its citizens on how to form an energy community to implement energy efficiency and renewable energy measures and get funded by various sources including the National Programme for Energy Efficiency of Multifamily Residential Buildings.



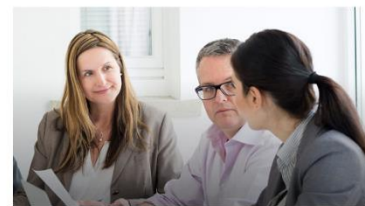
ADVANTAGES

Gather in one place all necessary competences to accompany the citizens along the journey for energy efficiency measures implementation for the entire building from the initiation through getting funded until implementation of construction works;
Provide organizational, technical, legal and financial counseling to citizens free of charge;
Follow up about the results of measures implementation



WHO CAN BENEFIT?

All citizens of Asenovgrad Municipality who own apartments in residential multifamily buildings. They will be advised what, when and how to do in order to get funded to implement energy efficiency measures for the entire building.



HOW IT WORKS?

Anyone interested can register on our site for free and be guided through the process. In addition, there is a physical office open in the administrative building of the Municipality where people can go and talk in person with municipal experts – UPSTAIRS Implementation Champions and get advice on how to proceed.

Source: <https://www.upstairs-energy.com/en-bq/asen/default.aspx>

Work in the OSS focuses on counselling, which can accompany the citizens along the way to implement energy efficiency measures for the entire building from the initiation through getting funded until implementation of construction works. MFABs receive detailed advice about when and what to do to get funded, and how to implement energy efficiency measures for the entire building. The latter point is crucial, as in prior years it was often the case that single owners carried out small-scale refurbishment works and insulation just on the facade part of an MFAB that belonged to them. For some years now this has not only been prohibited, but the prohibition has been strictly enforced by the municipality.

Importantly however, support does not stop at providing counselling. During the application process, OSS experts prepare the application forms for MFABs, the project budgets and submit them to the national authorities. During the implementation phase, once the buildings are selected for financing, the municipality runs a public procurement process and selects companies to carry out the energy

efficient interventions and construction monitoring. OSS experts also prepare and submit the projects' financial and technical reports. The monitoring itself is then financed by the buildings in the form of an energy audit, checking if the interventions have reached the planned results.

The support programs offered by the OSS are all 100% financed by the state, thus no additional resources are required either from the side of the residents or the municipality. However, change is to be expected, as a new subsidy program was accepted in 2023 reduces the state support to 80%. It remains to be seen how residents will react to this changed scenario.

Whereas the primary target group of the OSS consists of the residents of MFABs with more than 36 apartments in Asenovgrad Municipality, owners in smaller buildings as well as single-family home owners can come in and receive advice free of charge. Despite the fact that single-family owners have less options for financing, advice can come handy to carry out smaller-scale refurbishment or apply for the only viable program.

Getting in touch with the Asenovgrad OSS is easy: anyone interested can register on the website or visit the physical premises. As part of setting it up, a full-scale campaign was carried out to reach its future clients. This included interviews in the local press, announcements in the municipal website, and the distribution of brochures among the MFABs. Additionally, meetings were organised with building representatives.

While the current maintenance of the OSS is not a question - the operation of the OSS was fully financed by the UP-Stairs project and after that the municipality took it over for an additional two years - finding new resources to pay for the maintenance costs is imminent, as on the long run the municipality might not be able to maintain the physical premises with the dedicated employees.

Evaluation of the OSS Asenovgrad

Strictly speaking, the OSS in Asenovgrad can be deemed successful. Through its operation it consulted numerous buildings, and managed to apply for funding for 27 of them. It was a success also for serving as a good example for other Bulgarian municipalities. The details however show a picture where there is a dependency on EU funding, a need for legal changes in the condominium management legislation and uncertainty about how people will react once the level of subsidies will be lowered from 100 to 80%.

The operation of the Asenovgrad OSS is strongly tied to the very specific policy context in Bulgaria, that gives an active role for municipalities in the Bulgarian energy efficiency support framework. Even without operating an OSS, municipalities are entrusted with the technical management of the subsidy programs. Thus, they practically run the programs on a local level, where they not only cooperate very closely with the buildings, but are involved in the application process - preparing and submitting the forms - in the implementation phase - running a public procurement process and selecting the companies to carry out the interventions - and finally in the monitoring phase itself. (Geróházi - Szemző, 2023). The necessity of these complex tasks partially resides in the fact that the management of multi-apartment buildings is still viewed as a great difficulty, where only a fraction of the buildings pay external companies, many choose to elect representatives from the owners, who do the management free of charge. There are many cases when a building has no representative at all.

In this institutional context the municipality steps in as a vital actor, making the energy efficient intervention possible, by providing the skills that are missing on a building level. The establishment of an OSS is only a step further from this activity, allowing the municipalities to reach out and manage their work in a more systematic manner, and to do more in awareness raising and training than otherwise. Thus, it is not only in Asenovgrad where we find OSSs, but also in many other cities like Burgass, Plovdiv or Sofia. Importantly, smaller municipalities without resources for a one stop shop can form associations, like the Association of Rhodope Municipalities, which consists of over 10 members.

An established OSS - like the one in Asenovgrad - is also instrumental in empowering residents and making the housing associations operational. Currently in Bulgaria the legal framework for housing management and housing associations is undergoing changes. While it is now possible for housing

associations to have a joint bank account, as it was mentioned above the professional management of the condominiums is still a rarity. The latest changes meant that decision-making mechanisms were also simplified, lowering significantly the threshold for the validity of a general assembly and for a binding agreement. (Gerőházi-Szemző, 2023) Thus, one important aspect of the OSS's activity both in Asenovgrad and elsewhere is making sure that housing associations operate well, most importantly meaning that residents come and decide together and refurbish the *entire building*. The latter is essential, as previously people were allowed to refurbish only parts of the building. Now municipalities enforce the restriction and the need to get a permit for facade renovation.

The role of EU projects seems seminal in the creation of OSSs in Bulgaria: for Asenovgrad it was the UP-STAIRS project that supported both financially and with guidance the setting up of the OSS, but for other cities there were different projects or other EU funding available. This dependence also highlights the essential role NGOs and other intermediate organisations play in this energy efficiency ecosystem: they find funding sources for municipalities and often write the applications themselves. This partnership allows municipalities both to build better networks and to be present on an international stage.

Conclusions

OSS is an institution growing in importance: while there are refurbishment subsidies available almost everywhere, there seems to be a reluctance by residents/buildings with the uptake of these subsidies to carry out energy efficiency renovations. This situation is slightly reminiscent of a system failure, where demand and supply side don't really meet. Therefore the OSSs were developed to remedy this situation and mitigate between the sides. The reasons behind this failure can be manifold, ranging from too complex subsidy schemes, too demanding renovation processes, lack of motivation of housing managers and /or residents or the difficulties created by an inadequate legal background. They can be present separately or together, depending on the particular local situation.

Thus, depending on the exact challenges they want to address and the local financial and institutional background, OSSs can be very different. Still, as the above analysed cases have all shown, there are certain similarities that connect the approaches. These, as well as the demonstrated innovative aspects can all inspire ComActivate pilots in institutionalising their OSS. The cases have shown various counselling mechanisms, maintenance schemes and have demonstrated that there are several ways available to reach out and support condominiums in the refurbishment process. And despite variations, they have also shown that there are also a few aspects that are indispensable to achieve success and sustainability for the OSSs.

1. The most important one seems to be the financial and organisational presence of a municipal entity. While the level might be indifferent - it is the regional one for Octave and Opengela and the city level for Asenovgrad or Vienna - what matters is that they need to be fully present both as a source of financing and as a source of institutionalisation. The combination of these two elements can secure the sustainability of a project, and allow it to reach out towards more vulnerable - non-paying - customers and think about long-term developments in a strategic way.
2. Successful OSSs need to build on a coalition of stakeholders - public and private: the field of refurbishments is very complex, intertwined with often not transparent relations and characterised by the lack of knowledge (and as a result lack of trust) of some actors, especially residents with restricted financial resources. As a result a successful OSS should strive to map the local stakeholder environment, engage in a working relationship with the different actors and present easy to use roadmaps and guidance for the different actors, most importantly for residents. Similarly, a trusted network of contractors and regular quality control checks directly by the OSS are important. Local NGOs can also play a vital role in these energy ecosystems: they can be important to get residents engaged, to mitigate differences between various stakeholders but also - as it is the case in Bulgaria - to help overwhelmed public entities to get funding.
3. There are no quick fix recipes, OSSs need to adapt to their own local circumstances, take into account their funding and institutional environments and develop their range of services accordingly. EU funding through projects - like for Vienna and Asenovgrad - can help, but also remaining flexible and learning from past mistakes, as it was in Vilnius, is essential. Similarly, the legal background influences substantially how the OSSs operates: e.g. in Bulgaria they are essential actors in the operation of the national subsidy program, while the Octave project in France is subsidised to help reach the country's 2050 climate goals.
4. Communication, customer outreach to people about energy renovation and personal engagement seem to be crucial everywhere, paving the way for a successful project implementation. And this takes not only money, but a lot of planning and time, especially that involves lengthy negotiations with homeowners, who are often disinterested and have other priorities. However, this is essential as it facilitates local involvement, supporting residents to mobilise their own funds, as it was the case in Opengela and Ghent, and really increase the number of projects as shown by the example of Vilnius.
5. OSS need to supervise a broad range of projects, which require the collection of an equally broad range of competences. Thus, various experts need to be recruited and kept as core team members to fulfil this complex task. Most importantly, they need to have excellent knowledge about energy audits, renovation works, financing, and legal matters.

6. Finally, a good website is essential. Although not a solution in itself, it can contribute substantially to the success and sustainability of an OSS.

The cases have also highlighted that there are a wide variety and complexity of services offered. The complexity of services seem to be the most pronounced in Vilnius and Asenovgrad, where OSSs practically take over the role of housing managers and engage actively in getting subsidies for the renovation and managing the phase of implementation and monitoring. For Octave, De Energiecentrale and Opengela the engagement also seems very important, but they do not take over the implementation, despite the advice they give to residents. The least complex seem to be the services in Hauskunft in Vienna, which mostly concentrates on providing free of charge counselling. Nevertheless, in this case complementary municipal services can make up for the hiatus of complexity, creating a well-functioning local system of services and subsidies to tackle energy efficiency investments.

Similarly, the way public funding is involved can take many forms. Sometimes public funding is fully provided to run the OSS - like for Hauskunft or for the OSS Asenovgrad - while there can also be a mix as in case for the Vilnius OSS, where they charge for the management part of the costs from the buildings. (They however can claim this as a subsidy from the state.) Public funding can also be used to support the initial stages of a project or a branch that is not sustainable, as shown by Octave. Besides the funding of operation, another difference could be in if an OSS provides subsidies. However, the cases studied in this deliverable are unanimous in this respect: while they all support residents to get access to subsidies, these are not provided by them but by some other - national, municipal or regional - entity.

The subsidy question is particularly important for energy poor households. OSSs introduced above do not focus particularly on energy poor households, but they all face with this issue in their daily operations. For the OSS in Asenovgrad this so far was little problem, as the subsidy rate was generally 100% for everyone. For Opengela the target group of the one-stop-shops are more vulnerable citizens in neighbourhoods where building construction was of poor quality and ill-maintained. One of the neighbourhoods also accommodates a high percentage of Romani people characterised by low income and high unemployment levels. Thus, even if not specifically mentioned, one of the aims of the project is to use the one-stop-shop as a measure to overcome and prevent energy poverty. Generally, it can be said that OSSs can only reach out towards energy poor groups if appropriate, targeted subsidies are available, since free of charge counselling will do little in their case. Besides this, good partnerships with banks can help to facilitate pre-financing loans, which can be especially important for low-income customers.

Finally, regarding the question of sustainability special observations need to be highlighted, which were showcased by the OSS Asenovgrad. The case has demonstrated to what extent in the CEE and Baltic region - the target area of ComActivate - many of the municipalities are reliant on EU funding to realise local projects. While many of these are also essential to reach EU-wide goals, municipalities often seem to be unable to maintain these projects on their own. Thus, ensuring the sustainability of newly created institutions, like the OSS in Asenovgrad, could be a common task to think about. National governments might not consider some of these achievements relevant to maintain, and maybe an additional EU funding stream could be considered specifically for this purpose.

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