



Final report on the training outcomes including further recommendations for training staff of national property owner associations and property owners in EU member States.



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1. BACKGROUND

Property owners are the key decision makers in improving the energy efficiency of the 160 million existing properties across the EU in order to meet the wider energy and climate objectives of the EU and reach a reduction in CO₂ of 80% by 2050. The TRAINREBUILD project provides support for the encouragement of building retrofit by residential homeowners and landlords and beyond.

The **purpose of Work Package 4** of the Trainrebuild project is to provide residential property owners with sufficient knowledge on:

- the potential energy efficiency measures that could be installed in their properties;
- the main EU Directives related to residential buildings retrofit (eg. EPBD and its recast, ESD, RED, CHP and the Energy Efficiency Directive), national and local legislation;
- the proposed and existing financial supporting schemes;
- learning from existing good practice examples.

This **work package** also enables residential property owners to understand the importance of a planned approach when thinking about improving the energy efficiency energy of their portfolio so as to achieve best value, minimise disruption and get buy in from their tenants.

2. OVERVIEW OF THE WORK PACKAGE IMPLEMENTATION

The Work Package 4 activities were led by the Royal Institution of Chartered Surveyors (RICS) in cooperation with UIPI and its local member associations (UNPI, Haus & Grund, CCPU, Pomida, NLA, SNP and collaboration of Confedilizia), as well as consortium partners ACE, EPE, ABSA and ARENE. Activities related to the training of residential building managers and co-ownerships in Belgium and France were led by ABSA and ARENE.

The training package was developed following the production of a questionnaire regarding the existing typical housing stock in the consortium partner Member States which was completed by each consortium partners and returned for analysis by RICS. The survey enabled an overview to be developed of the areas of commonality and also of difference, in particular of local building standards.

Workshops were used to firstly refine the information received through the questionnaire and to showcase the proposed training package as well as to discuss with the consortium partners the contents of the presentation, speaker notes and toolkit in order to guide the development of the work package. In particular, the research carried out by BIELLA under Work Package 2 Task 5 – Elaboration of results and training needs analysis provided the framework for the best practice length of training of 1 day.

A Laboratory for Trainers was carried out in May 2011 with the consortium partners to collect information on residential property in Belgium, France, Germany, Greece, Spain and UK to informing and supporting citizens in implementing energy efficiency and renewable energy measures in their homes. The information obtained

through the laboratory was used to produce the general training package and toolkit for trainers and property practitioners.

The Activities of this WP have started with identifying the main topics of the training package and toolkit using the findings of the activities of other WPs and the knowledge, experience of the WP leader. Experts meetings were organised to finalise the structure and to agree on how detailed the content should be, to ease the national adaptations of the general training package. The preparation of the general training package for trainers in English on the energy efficient refurbishment of residential buildings was completed by the end of 2011. The national adaptation for the seven target countries were done during the first half of 2012 with local expert support.

In addition to the training package, the toolkit represents a background document and further reference in a booklet form with the purpose to enable property owners to identify the issues that affect the energy use in and carbon emissions from their properties as well as understand the impacts and implications these can have. It supports property owners in identifying interventions that minimises energy use and carbon emissions in a cost effective way and understand the activities involves, costs, the disruption and directs them to further information.

The toolkit was designed to be a comprehensive, hands-on reference guide that embeds the information conveyed by the training package and a further source of information and best practices. In this sense, the toolkit complements the training package with the ambition to provide a legacy, rather than just a one-off training session.

A 'train the trainers' event addressing property owners association and residential building managers was attended by trainers from ABSA (BE), UIPI (FR, DE, ES, GR, IT, BE, UK), Biella (IT), ARENE (FR) and RICS (UK). Following the train the trainers event, and feedbacks from the trainers, further work continued to refine the training package and the toolkit for delivery to the target countries in collaboration with the project partners and national property owners associations. National specific adaptation including translation of the toolkit then took place during the first half of 2012, ahead of the national training events.

The training package and toolkit preparation, adaptation and translation was followed by the organisation of national training events in the seven focus countries of the work package, namely in Belgium, France, Germany, Greece, Italy, Spain and UK during the first half of 2012.

The training package was completed by the training module (Power Point presentation) on financing energy efficiency renovation prepared under WP3 and circulated end of March 2012. This part was completed with national information, translated and included in the national training modules. The UK's finance module focused exclusively on the imminent roll out of the "Green Deal" flagship initiative on financing energy efficiency.

As a follow-up activity of the training, the national versions of the Toolkits were disseminated through various channels (e.g. website, extranet, internal meetings, USB sticks, etc.)

3. ADAPTATION OF THE NATIONAL TRAINING PACKAGES

The general training package for trainers was prepared by the RICS in English in the course of 2011. The training package was divided in four main sections covering aspects of policy, building stock, financing and technological solutions as follows:

1. **Section 1:** Legal and policy background, providing information on the EU key legislation in the field of energy efficient refurbishment of building and the related national legal framework;
2. **Section 2:** The existing housing stock and related building standards highlighting potential energy efficiency measures for improvement
3. **Section 3:** Financing of the refurbishment of existing buildings, covering the financial instruments available for property owners both on a global level (EIB, EU Funds, ELENA, JESSICA) as well as on a national level such as Green Deal (UK) and Grenelle de l'environnement (FR).
4. **Section 4:** Energy efficiency measures, illustrating the most common and applicable technical solutions for the retrofitting of buildings including no and low cost improvements which would not normally be eligible for financial support.

The adaptation of the training package at national level was crucial to best reflect regional peculiarities in terms of climate, construction types, applicable measures, supply chain and market conditions, funding opportunities and economic realities, etc. in order to fit the needs of the audience (i.e. representatives of property owners associations, condominium managers and representatives or individual property owners).

In France and Belgium, specific attention was paid to adapt the training package to the requirements posed by co-ownerships (condominiums). For France, a first national toolkit was prepared by ARC, the subcontractor of ARENE, in order to fulfil the training need of buildings managers and condominiums as an entity. UNPI prepared a second toolkit for their members to respond to the need and interest of individual property owners. Hence, in France, two training modules were prepared, one for condominium managers and representatives and another for individual property owners, including individual co-owners and their representatives, which considerably increased the target audience in this country.

The overall package including the toolkit and training curricula is a proved to be a valuable tool to be disseminated to the trainers, property owners and property professionals in the seven focus countries of the Work Package 4. It allows trainers to use these materials and provide further training events or just disseminate them

freely among their colleagues and other interested partners beyond the Trainrebuild project.

The national versions of the training packages are available on the project website: <http://trainrebuild.eu/toolkits>

4. ORGANISATION OF THE NATIONAL TRAINING EVENTS

Under the Work package national training was organised in seven Member States during 2012, namely: Belgium, France, Germany, Greece, Italy, Spain and United Kingdom.

| Country | Type | Target | Dates | Location | Trainers |
|----------------|------------------|---|----------------|------------------|--|
| France | First Training | Condominium Owners Associations/Managers and Individual Co-owners | 26 April | Paris | ARC (ARENE) |
| | Second Training | Condominium Owners Associations and Individual Co-owners | 3 May | Paris | ARC (ARENE) |
| | Further Training | Representatives from local clubs | 12 July | Paris | UNPI (UIPI) |
| | | Individual Property Owners & co-owners | 19 September | Montargis | UNPI (UIPI) |
| | | Individual Property Owners + co-owners | 13 September | Clermont Ferrant | UNPI (UIPI) |
| | | Individual Co-Owners | 13 September | Paris | ARC (ARENE) |
| Italy | First Training | Property Owners Associations | 12 April | Milan | BIELLA Pro-bono Support of Confedilizia (UIPI) |
| | Second Training | Individual Property Owners | 14-15 November | Venice | BIELLA Pro-bono Support of Confedilizia (UIPI) |
| | Further Training | Individual Property Owners | 4-5 October | Biella | BIELLA |
| Germany | First Training | Property Owners Associations | 9 May | Berlin | Haus & Grund (UIPI) |
| | Second Training | Individual Property Owners | 24 August | Potsdam | Haus & Grund (UIPI) |

| | | | | | |
|----------------|------------------|--|--------------|-------------------|----------------------------|
| | Further Training | Individual Property Owners | 11 September | Bad Kreuznach | Haus & Grund (UIPI) |
| | Further Training | Individual Property Owners | 10 November | Markisch-Oderland | Haus & Grund (UIPI) |
| | Further Training | Individual Property Owners | 21 October | Ludwigsburg | Haus & Grund (UIPI) |
| UK | First Training | Property Owners Associations | 29 June | Birmingham | NLA (UIPI) and RICS |
| | Second Training | Individual Property Owners | 17 October | London | NLA (UIPI) and RICS |
| Spain | First Training | Property Owners Associations | 25 June | Madrid | CCPU (UIPI) |
| | Second Training | Individual Property Owners | 8 October | Barcelona | CCPU (UIPI) |
| | Further Training | Individual Property Owners | 6 November | Valladolid | CCPU (UIPI) |
| Greece | First Training | Property Owners Associations | 14 June | Athens | Pomida (UIPI) |
| | Second Training | Individual Property Owners | 15 November | Athens | Pomida (UIPI) |
| Belgium | First Training | Condominium Owners Associations and Individual Co-Owners | 11 October | Brussels | ABSA Support of SNP (UIPI) |
| | Second Training | Condominium Owners Associations and Individual Co-Owners | 26 October | Namur | ABSA Support of SNP (UIPI) |

Altogether, 23 training events were organised in the 7 targeted countries: Belgium (2), Italy (3), France (6), Germany (5), Greece (2), Spain (3) and UK (2) which is a departure from the 14 events (2 per Member State) originally planned, but having more participants and better geographical coverage than originally foreseen. Attendance at the training seminars changed considerably from one event to another, however on average, 25-30 participants were involved in each of these training sessions.

4.1 Training logistics

The training events took place in two main sessions:

- A first training session (Spring 2012) for representatives of property owners associations (and building managers and representatives from multi-residential buildings in France and Belgium) - the first training session provided valuable feedback to further adapt the training material to the need of individual property owners;

- (At least) a second training session (Autumn 2012) for property owners (and owners from multi residential buildings).

RICS has directly organised two national training events in the UK. The training materials were distributed to the participants in hard copies, followed by an electronic dissemination to them after the training. The first training event for trainers from the NLA was held in the central part of England in Birmingham on 29 June 2012. The second training event was held in London on 17 October 2012 for property owners. In both cases there were four speakers covering the four different sections. Locations and venues were chosen to ensure the best geographical representation as well as access and ease of transport to/from the venue.

UIPI and its national members played a key role in organising training workshops in France, Germany, Greece and Spain. In France and Spain, additional training events were organised to enlarge the target group and have a better regional coverage. Germany has followed the pyramid structure of Haus & Grund and opted for a decentralised approach to training, i.e. to cascade the training from representatives of local clubs to individual property owners. This scheme followed the federal structure of the German state (relevant also in terms of availability of regional funding schemes) and of the German property owners association.

To assist and coordinate the logistics of national training seminars, UIPI and EPE prepared a list of guidance documents (i.e. a 'to-do-list' and 'Training and reporting guidance') which included information on the adaptation of training materials, logistic guidance, reporting requirements and several conference calls were held to ensure the preparation of workshops are on track.

4.2 Content of the training

4.2.1 Lectures

The national training followed the structure and content of the training package modules and toolkit providing information and explanation by experienced experts, tailored and adapted to the specificities of the focus countries and supported by best practice examples.

4.2.2 Adaption between training events

Whilst the original proposal was to provide a training package and toolkit based on best practice 'top measures' to be applicable across all target countries, the trainers requested that the training materials covered all potential measures as this was considered the best way of ensuring that the training package and toolkit could be adapted to cover all eventualities in every Member State.

4.2.3 Case Studies

Presentations of case studies and examples, especially in Italy and in Spain, turned out to be very successful and accessible tool to better illustrate how concrete refurbishment projects could work in practice, what are the technical possibilities (and obstacles) for more ambitious energy efficiency renovations, compare actual

savings to projected ones as well as what are the behavioural issues in reaching higher energy efficient levels etc.



4.3 Service packages

The service package is the outcome of the pilot training sessions and represents a further adaptation of the training package and toolkit to take their content closer to the audience of individual property owners, members of the national/local associations beyond the duration of the project. It is a form of customised assistance and tailored advice on issues affecting home improvement projects, such as energy efficiency/renewable solutions, funding, planning, etc. In this sense, the 'service package' consists in fact of a set 7 service packages, highly customised and issued in the national language of the priority countries based on the already existing services provided by national associations of property owners to their members. The service packages enclose all the materials and tools necessary to organise additional training workshops.

Furthermore, consortium partners developed national action plans in order to support follow-up actions and the legacy of the project. This initiative, which wasn't originally included in the project proposal, constituted a considerable added-value in terms of continuity and predictions. EPE drafted a European Action Plan on the basis of the national action plans with the purpose to come forward with unified recommendations to mainstream renovation at EU level.

5. SELECTED GOOD PRACTICE EXAMPLES

5.1 Belgium

Belgium offered a clear example of reducing the cost of retrofits by economies of scale, i.e. by shortening and developing supply chains by involving energy supplier and companies offering energy efficiency solutions at the training of property owners and condominium managers. The Belgian toolkit and website had a specific focus on value chain management of co-owned multi-family apartment buildings.

The condominium toolkit addresses the specific legal framework of condominium as well as the differentiated responsibilities of the condominium manager and the co-owners. The events in Brussels and Namur, each hosted with the support of the regional authorities, have been very successful leading to new cooperation forms between UIPI Belgian branch, the association of condominium managers and the regional authorities.

5.2 France

Given the diversity of the partners involved in the project in France, the TRAINREBUILD team managed to extend the target group initially planned by producing two toolkits:

- one adapted to condominium managers and representatives,
- another addressing of individual owners (and co-owners).

This has allowed to directly address condominium managers, individual owners, the French property owners association and its representatives throughout 3 additional events with a good geographical coverage (Paris, Clermont-Ferrand and Montargis). The excellent uptake of training and considerable interest from all actors is projected to achieve beyond the 250.000 owners members of the UNPI targeted within Trainrebuild.

5.3 Germany

The German service package was conceived in a highly practical way, in order to considerably simplify the work of local Haus & Grund clubs committed to organise further training seminars. The German property owners association opted for a decentralised approach and delegated training to local representatives. This approach consisted in training local representatives during the first training and letting them organise further trainings. To help the logistics, national trainers prepared a number of practical guidance documents and materials such as, press releases, invitation letters, poster templates, etc.

5.4 Greece

The economic troubles of Greece made difficult to convince owners to refurbish their properties and realise the economic benefits of these undertakings. However, one of the successes of the training was the achievement of special discount rates agreed between local craft companies, materials distributors and Pomida, the Greek property owners associations. This incentive was perceived as a practical and useful support to property owners deciding to renovate.

5.5 Italy

Surveys carried out by Biella showed the need for professional advisors to be better informed in order to provide property owners with reliable advice. The Italian training sought to include professionals as well as the property owners or their representatives in order to discuss better ways of communication, marketing strategies and convincing owners to invest in energy efficiency projects. As noted elsewhere, energy efficiency is notoriously difficult to sell for a variety of reasons. The involvement of professionals and property owners served two closely related purposes: first, educates and motivates the public; and second, drives business to those accredited professionals with high qualifications and standards.

5.6 Spain

Being a highly decentralised state, training events in Spain sought to achieve as wide regional coverage as possible. The involvement of representatives of local authorities to discuss funding opportunities and refurbishment measures raised the profile of the event, allowed exchange of information and generated interest in the project among local authorities.

5.7 UK

The focus of the training was on the practical implementation of the Green Deal and Energy Company Obligation (ECO), how landlords could benefit and how that would help to deliver the goals of the Trainrebuild project. Given the direct involvement of RICS and NLA with the policy making process, the trainers were in the best position to answer landlord's questions and give first hand insights into the secondary legislation for the Green Deal and ECO. The energy saving technologies were also discussed from the angle of what financial support these could get under the Green Deal and how these would fare in terms of reaching the 'golden rule', i.e. investments paid back by the savings made on the fuel bill

6. THE MAIN OUTCOMES OF THE TRAINING

Overall, there was a large and general interest amongst property owners to learn about energy efficiency and how to cost-effectively retrofit their properties, even if in terms of concrete outcomes resulting in concrete refurbishment projects, figures remain imprecise. The interest in this seminar shows that further seminars are warranted and as such most of the property owners associations will be organising further training seminars.

Although the term of 'training' was initially debated in relation to individual property owners as being perhaps a wrong terminology and approach, ultimately it appeared to be accepted as there was a real demand for training, education, improving the skills and building capacity as opposed to mere information and awareness raising.

6.1 Difficulties or gaps identified

During the training of property owners several issues have been flagged up as potentially hindering the uptake of energy efficiency refurbishments. These can be summarised as follows:

6.1.1 Capacity building

- Retrofitting involves a complex intervention which requires skills from owners to identify issues that affect the energy use and understand the impacts and implications various interventions can have. It requires property owners to take informed decisions based on costs, disruptions, savings, other benefits etc. Refurbishment projects require certain management skills to search for information, negotiate and follow up projects;
- In several cases weak or non-existent support for property owners from the expert community like local/regional Energy Agencies and local authorities or the support is provided against a fee; hence property owners associations and networks aim to fill in this gap;

- Supply chains needed to support larger scale refurbishments are underdeveloped.

6.1.2 Financing

- Tense budgetary conditions at national and community level which lessens the availability of public financial support
- Lack of knowledge on how to engage the banking sector beyond traditional financing
- The financing of multi-family buildings is considered challenging, to address the specificities of condominiums makes it more challenging;
- Not enough easy to access financial packages to support energy efficient refurbishment
- Very expensive packages to fund high energy efficiency investments, which leads to the lock in of such investments as home owners will go for the cheaper investment
- The cost of deep retrofit are, at present, significantly more than the likely limits of expenditure under available funding schemes (e.g. external wall insulation will likely break the 'golden rule' of the UK's Green Deal)
- No desire for high level energy efficiency refurbishments due to the costs and longer investment return rate
- Innovative technologies represent higher risk factors for the financial sector which makes these financial packages quite expensive and
- National programmes and funds are not always enough to initiate real market boost and in several cases they are not long term

6.1.3 Administration

- In many cases complicated approval procedures both for the local authority and for the landlords
- Frequently changing regulatory framework both at national and local level, restrictive planning permissions, short-lived funding schemes (e.g. Feed in Tariffs).
- Different levels of assistance and support given by property owners association proportional to the level of development of these networks.
- Cumbersome condominium laws which hinder decision making and the overcome of split incentives

6.1.4. Information dissemination and awareness

- Low level of access to information on energy efficiency technologies, funding schemes, procedures, risks involved, investment costs (including hassle and disruption) and investment returns, etc.; very general knowledge on the benefits
- Low level of information sharing between the local authorities about their experiences and best practices and also between the different departments of a local authority (e.g. Energy Department and PR Department);
- General lack of trust in suppliers of energy efficiency measures, installers and professionals; lack of impartial advice.
- Low level of participation in community projects and difficulties in mobilising property owners to take the decisive step to invest in and embark on home improvement project.

6.2 Recommendations

Several issues were highlighted as solutions for the above situation which are summarised below:

6.2.1 Capacity building

- Further or longer training would improve the capacities of the staff/representatives of property owners associations which would enable to roll out improved training seminars
- Build property owners communities and partnerships with local authorities, building professionals, experts, financial institutions and the supply chain with the view to develop Public-Private Partnerships, ESCOs, favourable financing packages for EE refurbishment and economies of scale.
- Encourage cooperation between local communities and the relevant stakeholders (energy providers, academia/schools, NGOs, SMEs) for sustainable energy production and consumption. The involvement of these stakeholder groups and cooperation could provide extra resources in terms of awareness raising, bonus packages for EE behavior, additional financial resources.

6.2.2 Financing

- Encourage to take a pro-active position to form a long-term commitment to refurbishment
- Development of local financing schemes to facilitate investment and independence from central government financing;
- Support and combine national financing schemes with local ones to lessen the burden on the property owners.
- Cooperate with local banks in developing innovative financial packages
- On national level, long term, reliable funding scheme and programmes
- The economical situation and financial possibilities of the different stakeholders cannot be changed in a short timeframe however adjusting funding schemes and programmes to the current needs might improve the appetite for energy efficiency investments in all sectors.

6.2.3 Administration

- Policies to remove split incentives and ease decision-making
- Cut red tape and administrative burdens
- Stable and coherent regulatory and financial framework both at national and local level

6.2.4 Information dissemination and awareness

- Develop local strategies on how to communicate and involve the public on energy efficiency refurbishments, with the cooperation and support of other important market players
- Regular meetings between the local public administration and the building owners association on the subject of energy efficiency in buildings

- Communication campaigns must be supported by all stakeholders involved (policy makers, financial market and supply chain)
- Awareness raising to be strengthened on all levels/subjects related to energy efficient investments and solutions
- Involvement of multidisciplinary teams in the drafting/roll out of future training programmes and information campaigns
- Establishment of local, free of charge, Info Points on energy efficiency for citizens
- By training the staff of property owners associations from across the focus countries, allowed a better dissemination of the project materials to all parts of the countries through the Local and Regional Representatives delivering local energy efficiency seminars.
- Training materials would need regular updating to extend their shelf life and continue to be useful in the future;
- Find the right balance between the scope of the training and the depth/level of details of subjects covered
- Targeted communication is essential: even national training packages would still need further local adaptation (especially in large Member States or Member States with decentralised administration);
- Additional practical information, such as case studies of concrete refurbishments and cost calculations tools, were perceived as being very useful.