



E3G

With the support of the Renovate Europe National Partners

BRIEFING

SPEEDING UP THE DELIVERY FOR RENOVATION

*Investing in
Advisory Services
and One-Stop-Shops*

October 2022



Summary

Better supporting customers through their renovation journeys, not only financially but also via advisory services, has long been advocated as part of the solution to accelerating building energy renovation in the EU. Maximising the potential¹ of technical assistance, for example through one-stop-shops (OSS), is crucial if we are to boost the deep renovation of the EU building stock in order to increase our energy security and cut households' energy bills.

One-stop-shops also have an important role to play in supporting the introduction of Minimum Energy Performance Standards (MEPS) in the Buildings Directive (EPBD) and in driving the take-up of renovation measures implemented through the National Recovery and Resilience Plans, Cohesion, and other EU funding as well as public programmes.

ADDRESSING KEY CHALLENGES

Renovate Europe highlights the role that advisory services and one-stop-shops can play in addressing key renovation market challenges:

1. Overcoming fragmentation of the renovation market on both the supply side and the demand side
2. Delivering deep holistic renovations

CALL FOR ACTION

Renovate Europe calls for further action on one-stop-shops for renovation via the following mechanisms:

1. Enact stronger regulatory requirements for advisory services for example linked to MEPS in the EPBD including:
 - Make one-stop-shops easily accessible to people
 - Use online tools as entry point to more tailored support
 - Link customers to qualified contractors to increase confidence and boost upskilling
 - Use common transferable models and adapt them to local contexts
2. Use EU funding such as MFF to support the deployment and upscaling of advisory services for buildings renovation

This briefing takes stock of the state of play at national level of the existence and coverage so far of one-stop-shops in Member States, and demonstrates that there are several good practice examples that are ready to be scaled-up or replicated in other Member States.

Introduction

While funding and financing options are important incentives for and enablers of renovation, public policy has tended to put insufficient emphasis on other types of measures to kickstart renovation¹. Structural characteristics of the construction sector such as fragmented supply chains create complex decision-making processes for property owners and can result in bottlenecks that stop potential renovation projects going ahead. Advisory and technical assistance facilities such as one-stop-shops have a key role to play in bridging the gap between property owners considering renovation and prospective suppliers of services and financing. They are key for the scaling up of energy renovation and lowering the burden on homeowners².

One-stop-shops are transparent and accessible advisory tools that help consumers navigate the complexity of energy efficiency renovations, while facilitating business model innovation among suppliers. Member States have been encouraged to facilitate access to them since the revision of the Energy Performance of Buildings Directive in 2018. As part of the most recent update of the regulation, advisory tools such as one-stop-shops have been recognised as *“indispensable to provide the right enabling framework and break barriers to renovation”*, with proposals to target *“all actors involved in building renovations, including homeowners and administrative, financial and economic actors, including small- and medium-sized enterprises”*³. Furthermore, a specific role is foreseen for technical assistance such as one-stop-shops to help with the compliance with Minimum Energy Performance Standards (MEPS).

One-stop-shop activity has increased over the last 5-10 years, with a recent review identifying 63 one-stop-shops in 22 EU Member States, 57 of which were operational in 2020⁴. They vary in the type of organisation running them and in the services they offer. Organisations implementing one-stop-shops can be national, regional or local government; industry; energy agencies; energy service companies (ESCO); energy consultants; and cooperatives or associations⁵. They are also differentiated by their level

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¹ Boza-Kiss, Bertoldi, Della Valle and Economidou, 2021, One-stop shops for residential building energy renovation in the EU, JRC, <https://op.europa.eu/en/publication-detail/-/publication/423a4cad-df95-11eb-895a-01aa75ed71a1>

² *Christophe Milin Adrien Bullier ECEEE Summer Study 2021.pdf (fedarene.org)

³ EUR-Lex - 52021PC0802 - EN - EUR-Lex (europa.eu)

⁴ Boza-Kiss, Bertoldi, Della Valle and Economidou, 2021, One-stop shops for residential building energy renovation in the EU, JRC, <https://op.europa.eu/en/publication-detail/-/publication/423a4cad-df95-11eb-895a-01aa75ed71a1>

⁵ Volt and McGinley, 2021, Underpinning the role of One-Stop Shops in the EU Renovation Wave: First Lessons Learned from the Turnkey Retrofit Replication, https://www.bpie.eu/wp-content/uploads/2021/11/06536-Turnkey-Retrofit-report_RenovationWave.pdf

of involvement in the renovation process.

One-stop-shops can be set up according to three main ‘models’ to intervene at different levels. The simplest ones intervene at the ‘orientation’ stage, and help define the client’s project, advise about available financing and provide a list of recognised contractors (facilitation model). The next level up offers a more detailed project plan and assistance, contacting other actors such as tradespeople or financial institutions (**coordination model**). The most complete model offers to accompany the customer throughout the renovation journey, from information and project design through to contact with suppliers and financial institutions, realisation of the work itself and quality assurance after the work is done (**all-inclusive model**)⁶. The all-inclusive model is the only one in which the one-stop-shop is a contractor and bears responsibility for the quality of the work.

Public intervention in the set-up of OSS is important as a means of ensuring the independence of the advice and gaining trust from citizens. It is also helpful to ensure the stability and support the development of one-stop-shop services. This will require strategic decisions by public authorities and tailoring to local circumstances, including the potential adaptation of regulatory frameworks and investment in skills and capacity.

⁶ Cicmanova et. al., 2020, How to set up a One-Stop-Shop for Integrated Home Energy Renovation?, INNOVATE project, <https://energy-cities.eu/publication/how-to-set-up-a-one-stop-shop-for-integrated-home-energy-renovation/>

ADDRESSING KEY CHALLENGES

Renovate Europe highlights the following key challenges that could be addressed by further developing advisory services.

1 OVERCOMING FRAGMENTATION OF THE RENOVATION MARKET ON BOTH THE SUPPLY SIDE AND THE DEMAND SIDE

Engaging in a renovation project can be daunting from a customer perspective. Property owners interested in renovation may need to interact and enter contractual relationships with a range of different stakeholders including architects, engineers, craftspeople from different trades, financial institutions and local administrations. Customers face a wide range of decisions which can be time consuming, costly and risky in terms of quality (and depth) of renovation. They face challenges both with the complexity of interactions and a lack of knowledge of renovation options, of the construction trade and of administrative regulations⁷.

For suppliers, the diversity of renovation projects both in terms of client expectations and project scope can reduce efficiency as they spend resources establishing contact with property owners that do not materialise into clients because of failures elsewhere in the supply chain. One-stop-shops that work directly with craftspeople, or provide lists of certified craftspeople to clients, act as a direct link between craftspeople and customers who already have a well-defined project, reducing chances of project failure and wasted time.

By acting as a well-informed contact point between the property owner and suppliers one-stop-shops guide customers with suitable advice, helping to reduce information gaps and convert potential projects into reality. Over time, one-stop shops, with accumulating knowledge, experience and evaluation of local renovation preferences and projects, have the potential to become key players in the development of investable, deliverable local and regional renovation plans that actively support national and EU objectives.

⁷ Milin and Bullier, 2021, Towards large-scale roll out of "integrated home renovation services" in Europe, ECEEE summer study proceedings, https://www.aunaforum.com/wp-content/uploads/2021/07/Integrated-home-renovation-services_MILIN-BULLIER_ECEEE-2021.pdf

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DELIVERING DEEP HOLISTIC RENOVATIONS

The annual deep renovation rate in the EU is 0.2%. In order to achieve the objectives of the Renovation Wave the deep renovation rate needs to reach 3% by 2030⁸.

One-stop-shops can increase the rate of deep renovation by ensuring that clients are fully informed of the wider renovation possibilities available to them. They do this in different ways ranging from providing information and supplier contacts to designing a full renovation plan (via Building Renovation Passport) and accompanying clients all the way through the renovation journey. This can either be a one-shot approach, or, depending on financial constraints, a step-by-step plan.

One-stop-shops can also be helpful in ensuring that holistic renovations are carried out, with a consideration of other important quality aspects for a building. For example, improving accessibility via a lift or improving the electrical installation as a safety precaution or because of an increased need for electrification (for a heat-pump or electric vehicle) could be an important reason to trigger a more holistic approach, facilitating roll-out and acceptability of deeper renovation.

The public sector's involvement is also crucial, as public sector-run one-stop-shops will have an inherent interest in encouraging deep renovation because of the additional energy savings. This may not be the case for private sector actors, if the additional renovation is not financially attractive⁹ for them. Public authorities can help all types of OSS prioritise deep renovation with their clients by creating a financing framework that incentivises multiple renovation actions, for example by awarding additional subsidies for bundled renovation actions or focusing grants on renovation activities with less immediate economic benefits.

OSS can also be a key tool for ensuring that regulatory action is complied with to deliver deep renovation rather than short-term fixes. Working in response to rules on renovation, they can encourage building owners to choose deep renovation early on and avoid minimum-effort options that risk 'lock-in' and repeated renovations as Minimum Energy Performance Standards (MEPS) for buildings become more stringent.

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⁸ BPIE, 2021, The Make-or-Break Decade: making the EPBD fit for 2030, https://www.bpie.eu/wp-content/uploads/2021/08/BPIE_Making-EPBD-fit-for-2030_Final.pdf

⁹ Boza-Kiss, Bertoldi, Della Valle and Economidou, 2021, One-stop shops for residential building energy renovation in the EU, JRC, <https://op.europa.eu/en/publication-detail/-/publication/423a4cad-df95-11eb-895a-01aa75ed71a1>



Best practice example to be replicated or upscaled:

In the Brussels Capital Region, authorities have aided one-stop-shops in encouraging deep renovation with an additional ‘bonus’ subsidy offered when three or more subsidies from different categories of renovation action are combined (wall insulation, floor insulation, roof insulation, etc.). Property owners receive an additional 10% in the value of their grant if all subsidies are applied for at the same time¹⁰.

¹⁰ https://renolution.brussels/sites/default/files/media-documents/2022-04/tableau_primes-renolution_2022xlsx.pdf

CALL FOR ACTION

Investing in advisory services has long been advocated as part of the solution to accelerating building energy renovation in the EU. Maximising their potential to better match demand and supply for renovation projects will be crucial if we are to boost the deep renovation of the EU building stock.

One-stop-shops also have an important role to play in supporting the introduction of Minimum Energy Performance Standards (MEPS) in the Buildings Directive (EPBD) and in driving the uptake of renovation measures implemented through the National Recovery and Resilience Plans, Cohesion and other EU funding as well as public programmes.

Significant progress to expand and improve access to advisory services to undertake renovation projects is needed across all Member States and at all levels. Renovate Europe calls for action on advisory services for renovation via the following mechanisms:

1 ENACT STRONGER REGULATORY REQUIREMENTS FOR ADVISORY SERVICES FOR EXAMPLE LINKED TO MEPS IN THE EPBD INCLUDING:

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Make one-stop-shops easily accessible to people

One-stop-shops function well when they are close to the people they serve¹¹. In order to thrive, they need to be easily accessible to people. In several Member States, one-stop-shops are managed at regional level (Belgium, France, Netherlands, Spain, amongst others), including by local or regional energy agencies. Specific knowledge of the area allows the one-stop-shops to respond to the local market and conditions, such as predominant forms of residential accommodation and region-specific financing options. Proximity makes it easier for face-to-face meetings between the one-stop-shop and clients as well as visits to the property to be renovated.

¹¹ Boza-Kiss, Bertoldi, Della Valle and Economidou, 2021, One-stop shops for residential building energy renovation in the EU, JRC, <https://op.europa.eu/en/publication-detail/-/publication/423a4cad-df95-11eb-895a-01aa75ed71a1>

Best practice example to be replicated or upscaled:

The Renov'Occitanie programme is run by the French region Occitanie and has 31 local one-stop-shops spread across the region¹². Varying levels of assistance are offered: free orientation and technical advice; creation of a paid for but subsidised renovation plan; and a subsidised all-inclusive service that provides assistance throughout the renovation journey.



Use online tools as entry point to more tailored support

Online tools typically allow users to estimate potential energy savings, investment costs and payback time for various renovation options, as well as accessible financing options. Advantages for users include their ease of use and rapidity of results. Such online tools are useful for public authorities as they are able to quickly inform the public about energy savings and renovation financing, and are easily replicable between different regions (and even Member States¹³) following an initial investment.

Calculations can be based on data from energy performance certificates or user-provided data. By providing results instantly and with minimal effort from the user, the tools quickly demonstrate advantages of renovation and can act as a trigger to taking further steps, while preparing one-stop shop service providers for new clients. To ensure renovation action is taken, initial screening should be followed up by contact, remotely or on-site. The informational element primes clients with initial understanding of potential renovation activities and helps optimise follow-up meetings.

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Best practice example to be replicated or upscaled:

The Dutch *regionaal energieloket huiscan* website uses a single tool for the whole country but regionalises the results according to the user's address. The simulator takes users through a simple questionnaire about their home to determine potential renovation options, investment costs, energy savings and the payback period. It requests users to input their address and uses open data to partially fill in the questionnaire. After the results, the user is directed towards a local one-stop-shop for a first meeting. The initiative is run by private consultants in collaboration with 60 Dutch municipalities.



¹² <https://renovoccitanie.laregion.fr/Logements-individuels>

¹³ Volt and McGinley, 2021, Underpinning the role of One-Stop Shops in the EU Renovation Wave: First Lessons Learned from the Turnkey Retrofit Replication, https://www.bpie.eu/wp-content/uploads/2021/11/06536-Turnkey-Retrofit-report_RenovationWave.pdf

¹⁴ <https://huiscan.regionaalenergieloket.nl/>

Link customers to qualified contractors to increase confidence and boost upskilling

One barrier to engaging in renovation is the perceived unknown quality of contractors. Perceived risks of contractors delivering poor-quality work can discourage property owners from taking the final steps in a renovation project, which often entails considerable investment and disruption. By providing a list of trusted tradespeople, one-stop-shops can raise the confidence of clients in their contractor choice.

This quality assurance can be combined with existing certification systems for energy efficient renovation. Requiring construction sector stakeholders to have followed specific qualifications to be included on the list can incentivise their investment in upskilling, thereby contributing to reducing the skills shortage in energy efficient construction. Many OSS use training as a means of assuring a standard level of quality for renovation from the contractors that they work with¹⁵. Training is given either by the OSS itself or in cooperation with training institutions or industry associations.

Best practice example to be replicated or upscaled:

1. The Danish system BetterHome provided training and digital tools for carrying out work to craftspeople that it works with to ensure a standardised level of quality across contractors. Contractors must have undertaken this training to enter the network of contractors that BetterHome works with¹⁶. The programme was initiated and run by several private sector companies, but has been discontinued.

2. A Dutch government-run platform advising homeowners on renovation directs users to external websites listing certified tradespeople by trade¹⁷. The external websites are run by industry associations and are affiliated with various training bodies. The website also helps to boost confidence of users by providing a guide to evaluating and selecting quotes for the renovation.



¹⁵ Boza-Kiss, Bertoldi, Della Valle and Economidou, 2021, One-stop shops for residential building energy renovation in the EU, JRC, <https://op.europa.eu/en/publication-detail/-/publication/423a4cad-df95-11eb-895a-01aa75ed71a1>

¹⁶ BPiE, 2017, Boosting renovation with an innovative service for home-owners: BetterHome, An industry-driven one-stop-shop solution, case study, https://www.bpie.eu/wp-content/uploads/2017/10/CASE-STUDY_BETTERHOME_05.pdf

¹⁷ <https://www.verbeterjehuis.nl/vind-adviseur-of-bedrijf/tips-voor-bedrijf-en-offerte/>

Use common transferable models and adapt them to the local context

Whilst OSS should be adapted to the particular characteristics of local markets, many aspects can be easily transferable between different regions. Aspects such as online information about different renovation activities, online simulators, automated renovation roadmaps, checklists for onsite visits, ex-post quality assurance processes and marketing can be easily replicable between regions and even Member States. This can create economies of scale, reducing financial and time commitments. Financial support for implementation of one-stop-shops could be available under the ELENA financing programme of the European Investment Bank¹⁸, the Disruptive PDA¹⁹ and the Integrated Home Renovation Services²⁰ calls under the LIFE clean energy transition sub-programme.



Best practice example to be replicated or upscaled:

The Horizon project *Turnkey Retrofit* tried to replicate two French all-inclusive industry-led one-stop-shops in Ireland and Spain. Both the French models were operating without public financing. The project collected learnings on which aspects of the OSS were easy to transfer and replicate in another Member State. The findings have been adapted into published guidelines for implementing the model in other Member States²¹.

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¹⁸ As mentioned in the June 2022 draft report on the EPBD by the European Parliament's ITRE rapporteur.

See <https://www.eib.org/en/press/all/2021-038-continued-eu-funding-commitment-to-support-energy-efficiency-in-urban-areas>

¹⁹ <https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/opportunities/topic-details/life-2021-cet-pda>

²⁰ <https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/opportunities/topic-details/life-2021-cet-homereno>

²¹ Torres, Jauregui and Urra, 2021, Guidelines for implementation in different European countries, Turnkey Retrofit, https://www.turnkey-retrofit.eu/wp-content/uploads/TR_D3.2_TEC_26_02_2021_FV.pdf

2 USE EU FUNDING SUCH AS MFF TO SUPPORT THE DEPLOYMENT AND UPSCALING OF ADVISORY SERVICES FOR BUILDINGS RENOVATION

Member States must better channel the funding available through the Multiannual Financial Framework (European Regional Development Fund and Cohesion Funding), the Recovery and Resilience Facility, the Just Transition Fund, the LIFE and Horizon Europe programmes towards support for the deployment and upscaling of advisory services for the buildings sector.

Member States could for example integrate provisions on advisory services into their MFF Operational Programmes, to support the deployment, help to scale up or replicate an existing model. The allocated MFF funds should be used as a basis to attract and leverage private investment, with the aim of delivering long-term investments in renovation beyond the end of the funding period. They could also be used in tandem with other national and EU funding streams to maximise impact.

Projects promoting energy efficiency of buildings can be funded under the European Regional Development Fund and Cohesion Policy specific objective 2.1 *Promoting energy efficiency measures and reducing green-house gas emissions*.

Support for one-stop-shops is also available under the ELENA facility of the EIB²².

²² European Investment Bank, ELENA – European Local Energy Assistance. See [here](#)

OVERVIEW OF STATE OF PLAY AT NATIONAL LEVEL

The table below shows existence and coverage of one-stop-shops in Member States, based on information found in Member States' Long-term Renovation Strategies and feedback from Renovate Europe's national partners.

	 Existence of one-stop-shops	 Country-wide availability	 Online energy savings calculation tool
Austria	✓	✓	✓
Belgium	✓	✓	✓
Bulgaria			
Croatia	✓		
Czechia	✓	✓	
Denmark	✓	✓	
France	✓	✓	✓
Germany	✓	✓	✓
Greece			
Hungary	✓	✓	✓
Ireland	✓	✓	✓
Italy	✓		
Latvia			
Netherlands	✓	✓	✓
Poland	✓		
Romania			
Slovakia			
Slovenia	✓	✓	
Spain	✓	✓	✓

This table and national tables in the annex are subject to change as more data is collected.

Annex

Initiatives implemented by Member States

Data collection is ongoing and therefore the following tables and the simplified table above should be considered subject to change.



Austria

Existence of one-stop shops	Available country wide	Online simulator - options, costs, subsidies
Yes	Regional	Yes



Belgium

Existence of one-stop shops	Available country wide	Online simulator - options, costs, subsidies
Yes	Regional - subsidies differ based on region	Yes, according to region, quite basic

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Bulgaria

Existence of one-stop shops	Available country wide	Online simulator - options, costs, subsidies
A H2020 financed SHEERenov project has developed a replicable, market-oriented model for the provision of integrated building renovation services. Project results are envisaged for exploitation as a first phase of the NRRP One-Stop Shop Reform.		



Croatia

Existence of one-stop shops	Available country wide	Online simulator - options, costs, subsidies
Four one-stop-shops have been set up to help citizens with the post-earthquake reconstruction process in affected areas, aimed at energy renovation and seismic resilience		



Czechia

Existence of one-stop shops	Available country wide	Online simulator - options, costs, subsidies
EKIS energy consultation offering free public service	60 across country	No



Existence of one-stop shops	Available country wide	Online simulator - options, costs, subsidies
Yes	Independent advisors	Yes



Existence of one-stop shops	Available country wide	Online simulator - options, costs, subsidies
Yes	Regional and municipal (450 offices across France)	Yes

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Existence of one-stop shops	Available country wide	Online simulator - options, costs, subsidies
Yes, online, and through consumer organisations	Regional	Yes, basic Federal-level questionnaire directing towards available renovations. Detailed online simulator with grants adapted to region (sanierungs konfigurator) but may no longer be up to date



Greece

Existence of one-stop shops	Available country wide	Online simulator - options, costs, subsidies
No		



Hungary

Existence of one-stop shops	Available country wide	Online simulator - options, costs, subsidies
Several energy advisory networks and one-stop shops, covering certain areas. H2020 project looking to become self-sufficient	Local and regional	Yes

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Ireland

Existence of one-stop shops	Available country wide	Online simulator - options, costs, subsidies
Yes - full management service offered	Regional and national - run by accredited private providers, mostly with national coverage	Simulators available on individual one-stop-shop providers' sites

*Italy*

Existence of one-stop shops	Available country wide	Online simulator - options, costs, subsidies
Yes, needs development		

*Latvia*

Existence of one-stop shops	Available country wide	Online simulator - options, costs, subsidies
No		

*Netherlands*

Existence of one-stop shops	Available country wide	Online simulator - options, costs, subsidies
Yes	Regional - subsidies differ based on region	Yes, with calculations of subsidies and contacts for certified professionals. Linked to address and available open data on the building; https://www.verbeterjehuis.nl/ and https://huisscan.regionaalenergieloket.nl/

*Poland*

Existence of one-stop shops	Available country wide	Online simulator - options, costs, subsidies
Some isolated examples at municipal or regional level	Local	No

*Romania*

Existence of one-stop shops	Available country wide	Online simulator - options, costs, subsidies
No (4 planned by 2030)		

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*Slovakia*

Existence of one-stop shops	Available country wide	Online simulator - options, costs, subsidies
No (and no plans mentioned in LTRS)		



Slovenia

Existence of one-stop shops	Available country wide	Online simulator - options, costs, subsidies
Energy advisory network for citizens - ENSVET, meetings with independent energy consultants; Further initiatives planned; Eco Fund, Slovenian Environmental Public Fund also offers some advice linked to subsidies	Municipalities (provided regionally, in all big town, and different event such as trade fairs).	No



Spain

Existence of one-stop shops	Available country wide	Online simulator - options, costs, subsidies
Yes - some regions only online	Regional networks of OSS and municipal offices operating on district strategies	Yes, according to region

About the Renovate Europe Campaign:

Renovate Europe is a political communications campaign with the ambition to reduce the energy demand of the EU building stock by 80% by 2050 through legislation and ambitious renovation programmes. Accelerating the rate of renovation is a key tool in the fight against climate change, and will deliver major benefits for people, their quality of life, and the economy.

www.renovate-europe.eu

#Renovate2Recover

REC Partners (October 2022)

There are currently 49 partner companies and associations actively engaged in the work of the REC, of which 18 National Partners active in the Member States.



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