



# Aggregation and improved Governance for untapping Residential Energy Efficiency potential in the Basque Country

## D5.5: AGREE Academy Report

| Deliverable D5.5        |  |          |
|-------------------------|--|----------|
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## Executive Summary

This deliverable collects detailed description of the activities developed to facilitate and support the replication process of the AGREE project through the **AGREE Academy** to maximize its impact.

The residential building typology targeted in the AGREE project is widely spread in the Basque Country, Spain and Southern Europe, therefore they all face similar barriers in driving energy retrofitting processes in this building stock.

The results generated in the framework of the project have been spread through its replication from the local to the European level to promote energy efficiency by improving the prioritization processes of residential retrofitting interventions with high energy saving potential through the systematization of the methodology developed in WP2 (T2.3) and by implementing the propositional Deployment Package in WP3 for improving grant and loan design based on demand segmentation, mechanisms to promote demand aggregation, and improving governance and management protocols (T3.3). These results are available at <https://agree-basquecountry.eu/documentos/>

These resources developed in the framework of the AGREE project together with the experience gained in the implementation of the different tasks of the project by the different partners of the AGREE consortium have become the base for the activities performed in the AGREE Academy.

The peer-to-peer (P2P) learning methodology used in the performed workshops has enabled a collaborative way to exchange and learning between equals; participants who face similar situations in terms of experiences, interests and concerns. The results of these activities contributes to improve the capacities of the actors involved in the energy renovation of the building stock and provides valuable information to improve the implementation of renovation processes. Performed workshops have gathered around 50 people and we would like to thank them for their precious contributions.

Other activities led by different consortium members according to their expertise and area of influence took the form of webinars, university courses, etc. which allowed to reach a wider audience at International, National and regional level to maximise the impact of the AGREE project.

## Acronyms and abbreviations

|         |  |
|---------|--|
| EE      | Energy Efficiency  |
| EUSEW   | European Sustainable Energy Week                                       |
| UPV/EHU | University of the Basque Country                                       |
| SURs    | Urban Renovation Societies (Sociedades Urbanísticas de Rehabilitación) |
| WP      | Work Package   |

## 1 Introduction

### 1.1 AGREE project's context

The AGREE project aims to boost investments in Energy Efficiency (EE) retrofitting of private multi-family dwellings through the design, deployment, and dissemination of innovative and replicable mechanisms for demand activation, specific financing solution through the activation of a specific Renovation Fund led by the Basque Government, as well as other proposals on key issues such as governance, communication and management and demand aggregation.

The AGREE project focuses on a very widespread typology in the Basque Country, Spain, and Southern Europe; a group of buildings built before 1980, prior to the entry into force of the thermal regulations in Spain, which means that they have a great potential for energy improvement and therefore for energy savings. This AGREE target typology represents some 160,615 dwellings in the Basque Country and some 2,538,170 dwellings in Spain.

Many of these buildings face similar barriers to boosting energy renovation processes due to their complex structures, such as multi-ownership, governance and building management, and because of barriers to accessing the necessary financing.

The problem is similar in Southern European countries, where residential buildings with a similar typology and ownership structure are also abundant.

### 1.2 AGREE Academy's objectives

The AGREE Academy is the replication process of the AGREE project implemented through different activities led by AGREE consortium members at local, regional, national, and European level taking advantage of their current participation in existing networks.

The main objective of the AGREE Academy is to maximise the impact of the project by extending the benefits and results of the project through replication from the local to the European level to promote energy efficiency renovations. The AGREE Academy aims to promote the application of the methodologies developed in the framework of the project to improve the capacities of the actors involved in the energy renovation of the building stock.

As can be seen in the following scheme, the AGREE Academy (WP5) is developed transversally throughout the project, making available all the knowledge generated in the framework of the AGREE project, through the results such as:

- The methodology for carrying out the process of analysis, selection of pilot areas and detailed diagnosis of buildings; focused on local councils, so

- that they can address the renovation of homogeneous groups of dwellings in their municipalities based on an analysis and prioritisation of the opportunity (D2.2. of WP2: ASSESS\_ evaluation)
- The challenges and opportunities for the promotion of energy refurbishment, as well as examples of Best Practices in relation to financing mechanisms, governance, communication and management protocols, and organisational formulas for the aggregation of demand (D3.1 of WP3: FACILITATE\_ Facilitate)
  - The report which contains the proposals for improving funding, management, and governance mechanisms, as well as promoting demand aggregation (D3.2 of WP3: FACILITATE\_ Facilitate)
  - The Action Plans established in each pilot case that structures the process and the involvement of the different actors, establishing their role and participation in the process, especially that of the residents (D4.1 of WP4: MOBILIZE\_ Mobilize).

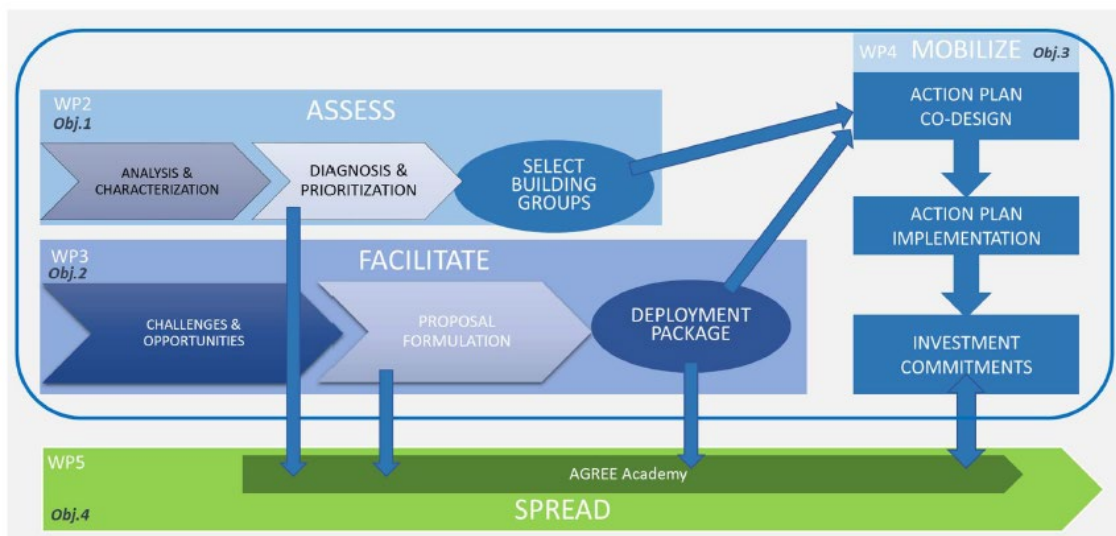


FIGURE 1- AGREE PROJECT DEVELOPMENT CYCLE

### 1.3 Expected impacts and verification of results

The replication process aims at increasing the impact of the AGREE project results. In addition to the tangible results, such as investments made, number of houses renovated, reduction of greenhouse gas emissions foreseen in the proposal, the replication actions also target the following impacts:

- Substantially improve the capacities of the actors involved in the energy renovation of the building stock.
- Implement measures to prioritise residential renovations
- Promote the methodologies developed in the framework of the project to foster the implementation of renovation processes.



The following means of verification have been established to verify whether the expected impacts have been achieved:

- Feedback obtained through the interaction of the participants with the organisers of the activities can help to improve both the material and the form of the dynamics carried out.
- Satisfaction surveys replied by participants at the end of the activities will provide feedback to ensure that the quality of the material, the organisation of the activities, capacities, skills, and knowledge of the information before and after the training activities are useful.
- Online publications on the AGREE project's website and social media about the AGREE Academy's activities workshops, meetings, lectures, and conferences contribute to the dissemination of the benefits of AGREE training activities.

## 2 Stakeholder groups and target objectives

The target audience identified for participation in the AGREE Academy is grouped as follows:

- Civil servants at national and regional level working in the field of Housing and Building Renovation (in Spain and the rest of Europe).
- Local civil servants working in the field of Housing and Building Renovation (in Spain and the rest of Europe).
- Staff of municipal housing and renovation companies (in Spain and the rest of Europe).
- Professionals and companies in the sector of renovation and management of energy regeneration areas (in Spain and the rest of Europe).

The profiles of these groups will require previous training in:

- Architecture and Urban Planning
- Technical Architecture and Construction Engineering
- Legal practice
- Social Work
- Sociology

Table 1 below presents the approach for each of the identified groups

TABLE 1 – AGREE ACADEMY’S STAKEHOLDERS GROUPS

| Target groups   | Approach  |
|---|---|
| <p><b>National and regional governments</b></p>                             | <p>National and regional governments are the ones that set energy efficiency and housing renovation policies and subsidies and therefore they will benefit from improved processes that are developed in the AGREE project in a way that results in higher renovation rates.</p>  |
| <p><b>Local governments and local housing and renovation agencies</b></p>   | <p>Local governments, as public bodies closer to the residents, may have better access to information on socio-economic conditions, as well as easier communication channels based on trust, allowing for close support and accompaniment of residents in the renovation process.</p> <p>Moreover, municipal strategic planning for energy retrofitting will benefit from the methodologies developed in the framework of the AGREE project for the prioritisation of residential renovation interventions with high energy saving potential.</p> |
| <p><b>Professionals and companies in the building renovation sector</b></p> | <p>The professional groups comprise both technical teams and those dealing with the management of energy renovation, as well as property managers who are involved in the processes by facilitating communication between the communities of owners and the administration.</p>   |

### 3 Types of activities and materials

The AGREE Academy has been performed with the participation of the members of the AGREE consortium according to their experience. The activities to spread the AGREE Academy have taken the following forms:

**On-site workshops:** For the face-to-face sessions, a global framework of action was established, providing information on the specific topic developed within the scope of the AGREE project. To this general framework, peer review sessions were added in which participants were able to comment on the challenges associated with both the implementation of energy renovation and those related to promoting investments, as well as propose new solutions.

**Webinars** are a good opportunity to share the best practices and results of the AGREE project with the public interested and involved in the energy renovation of the residential building stock in a broader way, without space limitations.

A series of webinars presenting the methodologies developed in the framework of the AGREE project can help the participating cities to initiate, plan and implement a prioritisation strategy for residential renovation interventions with high energy saving potential.

**Reports** generated in the AGREE project is another way of sharing the results of the project itself.

As project deliverables tend to be long and technical, an edition designed to convey the main message of the reports in an understandable language have been made available through AGREE's website, with the aim of attracting the interest of different audiences.

## 4 Summary of performed peer learning activities

4.1 This section presents an overview of the peer learning activities performed in the framework of the AGREE Academy Organization and management procedure for activities.

Below it is detailed the activities prior to carrying out the activities, such as preparatory actions required to guarantee the proper development of the workshops, to facilitate their coordination, control and management of resources, as well as the timing.

### 4.1.1 Expression of interest from participants

Based on the letters of support collected in the preparation phase of the AGREE project proposal, as well as the network of contacts provided by the Basque Government through Udalsareas (Basque network of municipalities for climate and sustainability) as well as other networks existing, the AGREE consortium partners proposed a list of possible participants in each of the defined activities. Each of the potential participants was sent an expression of interest form to participate according to the topic to be discussed, the scale and scope of influence in the different activities planned in the AGREE Academy. The form was also publicised through social media and the AGREE project's website for wider dissemination.

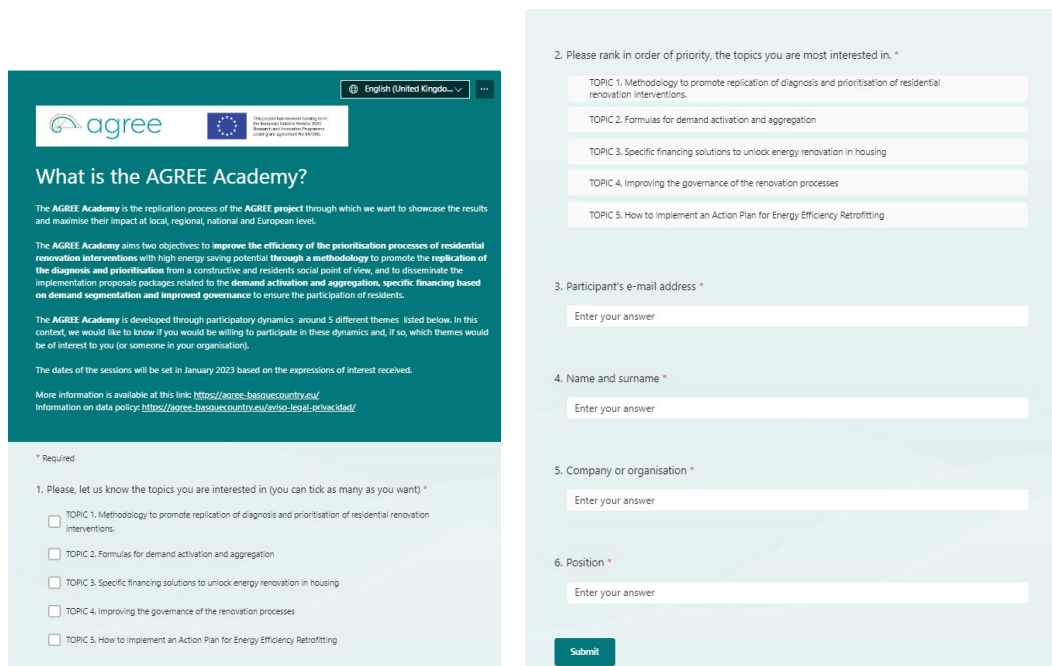
The letters of support included a declaration of intention from the entity to replicate the AGREE results and identification of the responsible team that will

lead it. In this way, the potential for replication could be determined, identifying the interested entities.

The proposed topics for AGREE Academy peer learning activities were:

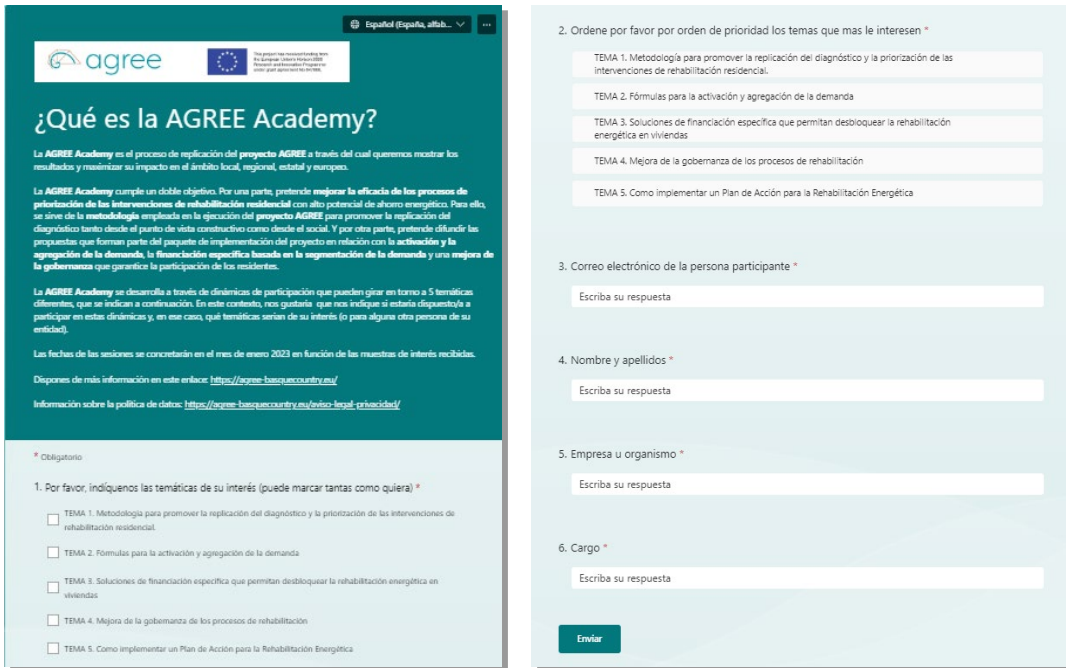
- a. Systematization of the methodology to promote the replication of the diagnosis and the prioritization of residential renovation interventions.
- b. Formulas for the activation and aggregation of demand
- c. Specific financing solutions that allow energy renovation in homes to be unlocked
- d. Improved governance of renovation processes
- e. Lessons learned from the implementation of the AGREE Action Plan

The following image shows the form prepared to evaluate the interest or willing to participate in these dynamics and, if so, which themes would be of interest



The screenshot shows a web form for the AGREE Academy. The form is titled "What is the AGREE Academy?" and includes the following sections:

- Header:** Includes the AGREE logo and the European Union flag.
- Introduction:** Explains that the AGREE Academy is a replication process of the AGREE project, aiming to showcase results and maximise impact at local, regional, national, and European levels.
- Objectives:** States that the AGREE Academy aims to improve the efficiency of the prioritisation processes of residential renovation interventions with high energy saving potential through a methodology to promote the replication of the diagnosis and prioritisation from a constructive and residents' social point of view, and to disseminate the implementation proposals packages related to the demand activation and aggregation, specific financing based on demand segmentation and improved governance to ensure the participation of residents.
- Development:** Notes that the AGREE Academy is developed through participatory dynamics around 5 different themes listed below.
- Sessions:** States that the dates of the sessions will be set in January 2023 based on the expressions of interest received.
- Information:** Provides a link for more information: <https://agree-basquecountry.eu/> and a link for the data policy: <https://agree-basquecountry.eu/en/iso-legal-privacy/>.
- Required Fields:**
  - 1. Please, let us know the topics you are interested in (you can tick as many as you want) \***
    - TOPIC 1. Methodology to promote replication of diagnosis and prioritisation of residential renovation interventions.
    - TOPIC 2. Formulas for demand activation and aggregation
    - TOPIC 3. Specific financing solutions to unlock energy renovation in housing
    - TOPIC 4. Improving the governance of the renovation processes
    - TOPIC 5. How to implement an Action Plan for Energy Efficiency Retrofitting
  - 2. Please rank in order of priority, the topics you are most interested in. \***
    - TOPIC 1. Methodology to promote replication of diagnosis and prioritisation of residential renovation interventions.
    - TOPIC 2. Formulas for demand activation and aggregation
    - TOPIC 3. Specific financing solutions to unlock energy renovation in housing
    - TOPIC 4. Improving the governance of the renovation processes
    - TOPIC 5. How to implement an Action Plan for Energy Efficiency Retrofitting
  - 3. Participant's e-mail address \***
  - 4. Name and surname \***
  - 5. Company or organisation \***
  - 6. Position \***
- Submit:** A button at the bottom of the form.



**¿Qué es la AGREE Academy?**

La AGREE Academy es el proceso de replicación del proyecto AGREE a través del cual queremos mostrar los resultados y maximizar su impacto en el ámbito local, regional, estatal y europeo.

La AGREE Academy cumple un doble objetivo. Por una parte, pretende mejorar la eficacia de los procesos de priorización de las intervenciones de rehabilitación residencial con alto potencial de ahorro energético. Para ello, se sirve de la metodología empleada en la ejecución del proyecto AGREE para promover la replicación del diagnóstico tanto desde el punto de vista constructivo como desde el social. Y por otra parte, pretende difundir las propuestas que forman parte del paquete de implementación del proyecto en relación con la activación y la agregación de la demanda, la financiación específica basada en la segmentación de la demanda y una mejora de la gobernanza que garantice la participación de los residentes.

La AGREE Academy se desarrolla a través de dinámicas de participación que pueden girar en torno a 5 temáticas diferentes, que se indican a continuación. En este contenido, nos gustaría que nos indique si estaría dispuesto/a a participar en estas dinámicas y, en ese caso, qué temáticas serían de su interés (o para alguna otra persona de su entidad).

Las fechas de las sesiones se concretarán en el mes de enero 2023 en función de las muestras de interés recibidas.

Dispones de más información en este enlace: <https://agree-basquecountry.eu/>

Información sobre la política de datos: <https://agree-basquecountry.eu/aviso-legal-privacidad/>

\* Obligatorio

1. Por favor, indíquenos las temáticas de su interés (puede marcar tantas como quiera) \*

- TEMA 1. Metodología para promover la replicación del diagnóstico y la priorización de las intervenciones de rehabilitación residencial.
- TEMA 2. Fórmulas para la activación y agregación de la demanda
- TEMA 3. Soluciones de financiación específica que permitan desbloquear la rehabilitación energética en viviendas
- TEMA 4. Mejora de la gobernanza de los procesos de rehabilitación
- TEMA 5. Como implementar un Plan de Acción para la Rehabilitación Energética

2. Ordene por favor por orden de prioridad los temas que mas le interesen \*

- TEMA 1. Metodología para promover la replicación del diagnóstico y la priorización de las intervenciones de rehabilitación residencial.
- TEMA 2. Fórmulas para la activación y agregación de la demanda
- TEMA 3. Soluciones de financiación específica que permitan desbloquear la rehabilitación energética en viviendas
- TEMA 4. Mejora de la gobernanza de los procesos de rehabilitación
- TEMA 5. Como implementar un Plan de Acción para la Rehabilitación Energética

3. Correo electrónico de la persona participante \*

Escriba su respuesta

4. Nombre y apellidos \*

Escriba su respuesta

5. Empresa u organismo \*

Escriba su respuesta

6. Cargo \*

Escriba su respuesta

Enviar

FIGURE 2. EXPRESS OF INTEREST FORM

## Results from the expression of interest

Through the graphs shown below, the results obtained from the expression of interest process are reflected, of which we can highlight the following aspects:

- Topic 1." Methodology to promote replication of diagnosis and prioritisation of residential renovation interventions". was the most voted among the 5 proposed topics with 57% of the score, followed by topic 5. "How to implement an Action Plan for Energy Efficiency Retrofitting "with 15% of the points.
- Among the participants, more than half come from the public sector (municipal and regional bodies, and academia), with the other 50% being private companies or business and professional associations in the architecture and construction sector.

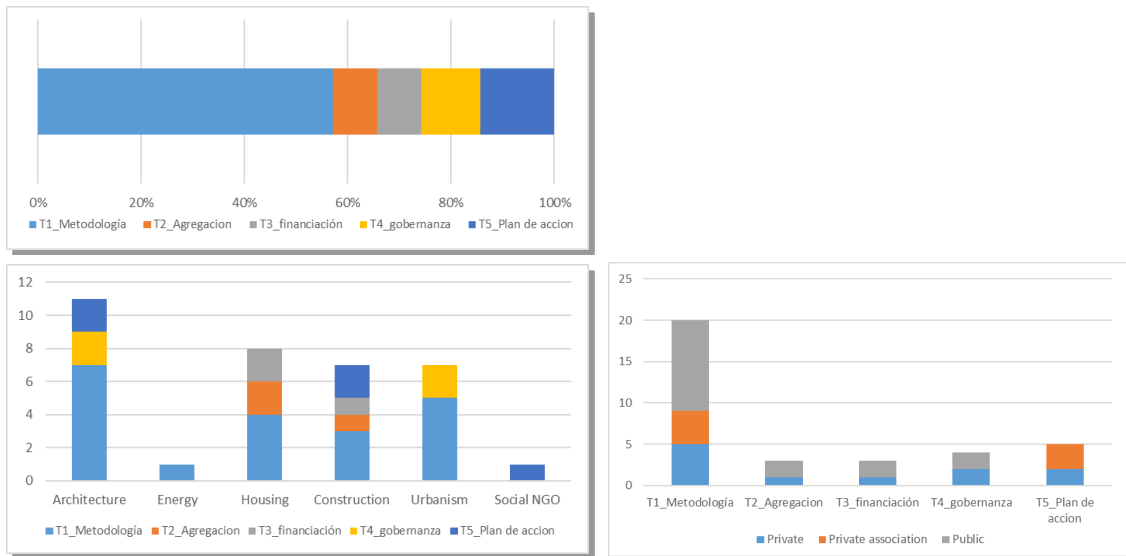


FIGURE 3. EXPRESSION OF INTEREST RESULTS

#### 4.1.2 Participant grouping

According to the responses received in the expression of interest from potential participants, participation groups were created for the different activities, prioritized according to the knowledge of each interested party, such as experience and common interests, creating different communities or interest groups, which allow addressing the different topics according to different levels of expertise.

#### 4.1.3 Organization management

Tecnalia, as leader of the AGREE Academy, has supervised, and coordinated the organization of the different peer to peer activities according to the schedule adapted to the development of the project results. Because of this, the main organizational actions in relation to the selection of participants have been carried out during the last period of the project.

These actions include:

- Team preparation and training
- Sending request for expression of interest
- Selection of participants
- Establish place and dates of activities
- Announcement of dates for celebration of social media activities
- Set place and date
- Activity agenda
- Sending a call to participants
- Activity material preparation
- Celebration of activities
- Follow-up

- Activity results report

As an example, below are some of the news, prepared to promote the activities, which were made through the different social networks.

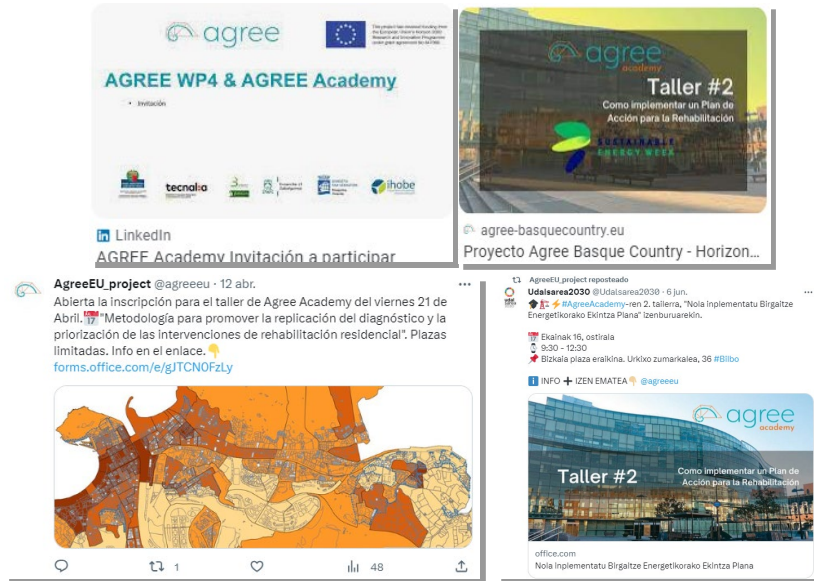


FIGURE 4. AGREE ACADEMY PUBLIC ANNOUNCEMENTS.

## 4.2 Performed activities and results

Two workshops were held within the framework of the AGREE Academy. The first, titled "Methodology to promote the replication of the diagnosis and prioritization of residential rehabilitation interventions" was carried out on April 21, 2023, and sought the exchange of knowledge between different agents with the purpose of identifying improvements in the AGREE methodology. The second workshop, held on June 16, 2023, had the objective of exchanging experiences between the different urban agencies in relation to "How to implement an Action Plan for Energy Renovation".

Both Agree Academy events were part of the European Sustainable Energy Week (EUSEW), which is the largest annual renewable energy event in Europe. EUSEW included as Sustainable Energy Days to promote renewable energy and energy efficiency.

TABLE 2 – PERFORMED ACTIVITIES

| SCOPE                  | TYPE OF ACTIVITY                                      | TARGET GROUP  |
|------------------------|---|---|
| Regional ,<br>National | - Methodology workshop and (diagnosis prioritization) | - Municipalities with SUR<br>- Municipalities of the Udalsarea 2030 network, Basque Network of Sustainable Municipalities |

|  |   |  |
|--|---|--|
|  | <ul style="list-style-type: none"> <li>- Workshop on experiences in the development of the Action Plan</li> </ul> | <ul style="list-style-type: none"> <li>(signatories of the Covenant of Mayors for Climate and Energy)</li> <li>- Other Basque Municipalities without SECAP (linked to the integrated LIFE URBAN KLIMA project)</li> <li>- Basque professional associations (COAVN, college of surveyors, CAFBizkaia, CAFGuia, etc.)</li> </ul> |
|--|---|--|

The format of both sessions was in person.

4.2.1 AGREE Academy Workshop 1: Methodology to promote the replication of the diagnosis and the prioritization of residential renovation interventions.

The workshop, framed in the replication process of the AGREE project, was held at the Tecnalia facilities, and was aimed at reviewing the key points of the project, delving into the aggregation of demand and the methodology of obtaining data for prioritization of the interventions.

a. Main goals

The workshop aimed to:

- First, present the methodology developed by TECNALIA within the framework of the AGREE project for the multidimensional characterization of municipalities through relevant indicators and their visualization in a Geographic Information System in a way that allows prioritizing residential renovation interventions with high energy saving potential.
- Second, exchange among participants their experiences in relation to how prioritization strategies for residential renovation actions could be improved at the municipality level from an integrated perspective, including social aspects.

b. Agenda and location

| Timing | Content / Responsible  |
|--------|--|
| 9h30   | Context and opening<br><i>José Antonio González, Housing Director of the Basque Government</i> |
| 9h45   | Methodology presentation<br><i>Olatz Nicolás, researcher at Tecnalia</i>                       |
| 10h30  | Q&A  |
| 10h45  | Coffee time  |



|       |   |
|-------|---|
| 11h15 | Experience sharing session<br><i>All the participants and the coordination team</i> |
| 12h00 | Common conclusions  |
| 12h30 | Closing and next steps  |

Date: Friday April 21, 2023 (from 9h:30 to 12h30)

Location: Tecnalía headquarters. Parque Científico y Tecnológico de Bizkaia. Laida Bidea, Edificio 204. Zamudio (Bizkaia)

*c. Dynamics of the experience exchange session*

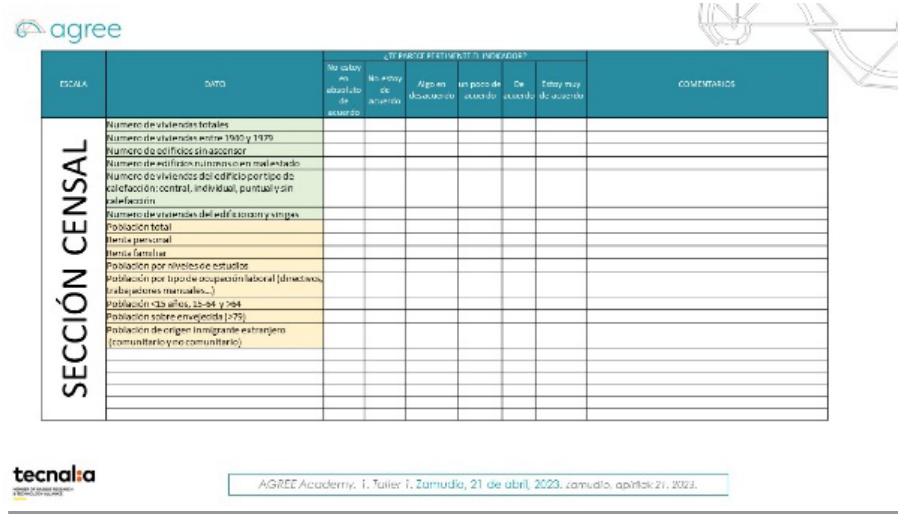
The main objective of this second part of the workshop was to continue improving the methodology with the contributions of the attendees and to be able to incorporate them into the replication guide.

Other goals:

- Exchange experiences about the selected indicators and suggest new indicators.
- Contrast the new indicators proposed by the attendees.

Organizational description:

- **Part1. Who's who in 1 minute:** The facilitator/moderator begins by introducing himself and invites the rest of the participants of the table to introduce themselves. In a minute, in addition to their name and the company where they come from, each one could briefly explain their experience with the methodology, giving the rest of the participants the opportunity to tell them they work with this type of data, methodologies, etc.
- **Part 2. Assessment of the indicators:** Each participant in each working table has two sheets with the indicators that were used, those at the census section level and those at the portal/building level. It was about individually assessing the relevance of the indicators selected for the methodology. They were asked to fill in the sheets with an X, for the most relevant indicators including if necessary specific comments for the subsequent debate. Apart from the listed indicators, each person had the opportunity to write down more indicators and possible sources of information relevant to diagnosis and prioritization on paper.



| ESCALA         | DATO   | ¿TE PARECE PERTINENTE EL INDICADOR? |                                 |                    |                    |            | COMENTARIOS |
|----------------|--|-------------------------------------|---------------------------------|--------------------|--------------------|------------|-------------|
|                |  | No aplica en absoluto de acuerdo    | No estoy en absoluto de acuerdo | Algo en desacuerdo | un poco de acuerdo | De acuerdo |             |
| SECCIÓN CENSAL | Número de viviendas totales  |                                     |                                 |                    |                    |            |             |
|                | Número de viviendas entre 1980 y 1979  |                                     |                                 |                    |                    |            |             |
|                | Número de edificios sin ascensor   |                                     |                                 |                    |                    |            |             |
|                | Número de edificios renovados en mal estado  |                                     |                                 |                    |                    |            |             |
|                | Número de viviendas del edificio por tipo de calificación: central, individual, puntual y sin calificación |                                     |                                 |                    |                    |            |             |
|                | Número de viviendas del edificio con y sin ascensor  |                                     |                                 |                    |                    |            |             |
|                | Población total  |                                     |                                 |                    |                    |            |             |
|                | Varia personal   |                                     |                                 |                    |                    |            |             |
|                | Varia familiar   |                                     |                                 |                    |                    |            |             |
|                | Población por niveles de estudio   |                                     |                                 |                    |                    |            |             |
|                | Población por tipo de ocupación laboral (directivos, trabajadores manuales...)                             |                                     |                                 |                    |                    |            |             |
|                | Población 13 años, 15-24 y 25+   |                                     |                                 |                    |                    |            |             |
|                | Población sobre envejecida (275)   |                                     |                                 |                    |                    |            |             |
|                | Población de origen inmigrado extranjero (comunitario y no comunitario)                                    |                                     |                                 |                    |                    |            |             |
|                |  |                                     |                                 |                    |                    |            |             |
|                |  |                                     |                                 |                    |                    |            |             |
|                |  |                                     |                                 |                    |                    |            |             |

FIGURE 5. EXAMPLE OF THE SHEET GIVEN TO THE PARTICIPANTS

- **Part 3. Discussion:** the filled sheets were shared among the participants to quickly read the results of the assessment highlighting those with discrepancies to comment on them and argue them. Those new indicators identified were also shared.

Materials used: several presentations with synthetic information about the methodology, Deliverable D2.1 (Diagnosis of the 3 study cases), Deliverable D2.2 (AGREE methodology), bibliography and other references.

d. Results and verification

The workshop, framed in the replication process of the AGREE project, reviewed the key points of the project, delving into the aggregation of demand and the methodology for obtaining data to prioritize interventions. The project results and the evolution of the three pilots launched in Vitoria-Gasteiz, Donostia-San Sebastián and Basauri, were shared with a peer-to-peer learning workshop format, that encouraged the exchange of impressions and the enrichment of conclusions. In this sense, the quality of the contributions was clearly favoured by the high number of attendees, and their high-level skills, both from partners and registered entities.

After the introductory presentation, the workshop was divided into three parts. The first presentation was given by José Antonio González, from the Housing Department of the Basque Government, who spoke about the need for “Aggregation and improvement of governance to take advantage of the potential for residential energy efficiency in Euskadi”. He highlighted the key points of the project, which sought to promote investments in the energy rehabilitation of private residential buildings, specifically those buildings built in the Basque Country between 1940-1980. Secondly, Olatz Nicolas Buxens from

Tecnalia intervened to delve into the “Methodology to promote the replication of the diagnosis and the prioritization of residential rehabilitation interventions.”

After the methodological introduction, special emphasis was placed on two aspects, firstly, the criteria followed to identify and map the set of buildings to be evaluated, and secondly, the definition of the indicators with which the decision was made to prioritize the intervention areas (or groupings of buildings) in a systematic way for replication in other municipalities.

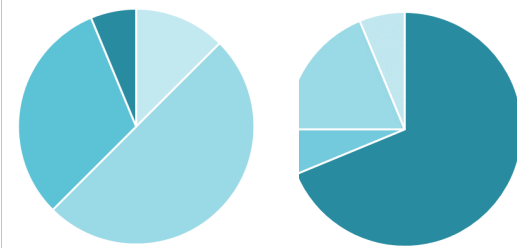
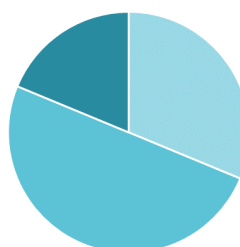
Finally, the conclusions gave the floor to the dynamics in four worktables for the sharing of experiences and the contrast of new indicators proposed.

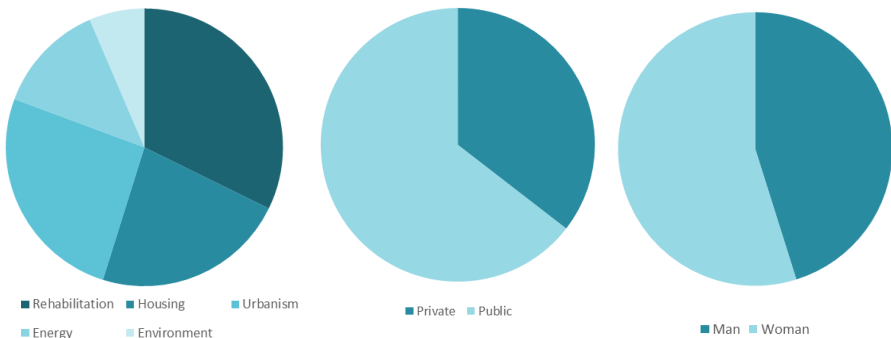
Among the conclusions of the workshop contributed by each table, it is important to highlight that the assessment of the entry into force of the Basic Building Standard NBE-CT-79, on Thermal Conditions in buildings, is no longer so relevant, suggesting a new temporary threshold to extend the study to the entry into force of the CTE (Technical Building Code (CTE) in 2006 because the energy efficiency of buildings is not really good and acceptable until that time. Finally, it was stressed that the conversion to electrification and the consequent need to change the combustion boilers is an issue that will modify some of the indicators for prioritizing the needs of the building.

The in-person workshops have been an opportunity for all participants to network and learn from others. The exchange of experiences has made it possible to identify not only the success stories, but also the difficulties that have been faced, and analyse possible solutions to the proposals developed and presented by the different members of the AGREE consortium. All this learning has been articulated according to the theme and level of influence (local, regional, state, or international) of the participants.



FIGURE 6. SOME PICTURES FROM THE 1ST WORKSHOP

| Means of verification                |   |
|--------------------------------------|---|
| <p><b>Questionnaires Results</b></p> | <p><b>Q1/Please rate the quality of the information shared at the event</b></p> <p><b>Q2/What did you think of the workshop in terms of duration, schedule, organization?</b></p> <p><b>Q3/Are/Will be the contents of the Workshop be useful for your work?</b></p> <div style="text-align: center; margin: 10px 0;"> <p>What did you think of the workshop in terms of duration, schedule, organization?      Are/will the contents of the Workshop be useful for your work?</p>  </div> <p style="text-align: center; margin: 10px 0;">Quality of the information shared at the event</p>  |

|                     |  |
|---------------------|--|
| <b>Participants</b> | <p>Attendance at the workshop reached 31 attendees. The following images show the distribution of participants according to area of experience, public or private origin and gender.</p> <p>As shown in the image, among the attendees we mainly find agents from the rehabilitation sector, followed by the housing and urban planning sector. Representatives of the energy and environment sector reach almost 20%.</p> <div style="text-align: center;">  </div> <p>The public sector is mostly represented, reaching 65% of attendees. Regarding the attendance of men (45%) and women (55%), there is a balance.</p> |
|---------------------|--|

#### 4.2.2 AGREE Academy Workshop 2: How to implement an Action Plan for Rehabilitation.

##### a. Main goals

The objective of the workshop was to present the process carried out in each of the SURs that are part of the AGREE project, to implement the Action Plan that has mobilized the rehabilitation of at least 510 homes, reaching an investment of approximately 8.5 million euros between the 3 areas selected as pilot projects.

##### b. Agenda and location

| Timing | Content / Responsible  |
|--------|--|
| 9:30   | Opening and context  |
| 9:45   | Round table. "How to implement an Action Plan for Energy Renovation"<br><i>Pedro Rodriguez (Bidebi)</i><br><i>Miren Cortazar (Ensanche 21Zabalgunea, S.A.)</i><br><i>Maider Romay (Donostiako Etxegintza)</i><br>Moderator: <i>Elena Sanchez</i> |
| 10:30  | Question session   |

|       |                             |
|-------|-----------------------------|
| 10:45 | Coffe                       |
| 11:15 | EXPERIENCE EXCHANGE SESSION |
| 12:00 | Sharing session             |
| 12:30 | Closing                     |

Date: Friday April 21, 2023 (from 9h:30 to 12h30)

Location: Alda, Urkixo Zumarkalea, 36, 6º, 48011 Bilbao (Bizkaia)

c. Dynamics of the experience exchange session

Organizational description:

- **Part1. Action Plans presentation:** the three SURs involved in the process present their experience on accompanying the residents of these buildings who face similar barriers to energy refurbishment, due to their complex structures, such as multi-ownership, governance and management processes, as well as barriers to accessing the necessary funding.
- Each SUR presented the lessons learned in the phases of the Action Plan. through a round of questions asked by the moderator of the discussion table on the following key aspects:
  - o In order to organise informative meetings with neighbours, specify their contents and systematise other support actions, the following plan was developed as shown in the images.

| PROYECTO AGREE                                      |  | 2021 |    |       |    |       |    |        |    |            |    |         |    |           |    |           |    |
|---|--|------|----|-------|----|-------|----|--------|----|------------|----|---------|----|-----------|----|-----------|----|
| PLANIFICACION ACTUACIONES DIFUSION ESTUDIOS PREVIOS |  | MAYO |    | JUNIO |    | JULIO |    | AGOSTO |    | SEPTIEMBRE |    | OCTUBRE |    | NOVIEMBRE |    | DICIEMBRE |    |
| ACTUACIONES   |  | 1Q   | 2Q | 1Q    | 2Q | 1Q    | 2Q | 1Q     | 2Q | 1Q         | 2Q | 1Q      | 2Q | 1Q        | 2Q | 1Q        | 2Q |
| S1  | Sesión informativa a los Administradores de Fincas. Explicación del diagnóstico de los inmuebles (problemática frecuente) y actuaciones planteadas en los estudios previos realizados. Explicación de la estimación de costes.   |      |    |       |    |       |    | V      | V  |            |    |         |    |           |    |           |    |
| S2  | Sesión informativa a los vecinos interesados. Explicación diagnóstico inmuebles (problemática frecuente) y actuaciones planteadas en los estudios previos realizados. Explicación de la estimación de costes. Entrega de ficha del inmueble a los interesados en continuar con el proceso. |      |    |       |    |       |    | V      | V  |            |    |         |    |           |    |           |    |
| S3  | Sesión informativa a los vecinos interesados. Explicación "CASO REAL" de rehabilitación energética (¿qué supone? ¿qué mejoras aporta? Etc)   |      |    |       |    |       |    | V      | V  |            |    |         |    |           |    |           |    |
| S4  | Sesión informativa a los profesionales vinculados al proceso de Rehabilitación Energética de los inmuebles. Explicación del proyecto AGREE.  |      |    |       |    |       |    | V      | V  |            |    |         |    |           |    |           |    |
| Acc1  | Elaboración de un folleto ilustrativo del proyecto AGREE para poder colocar en los portales incluidos en el ámbito junto con los 2 paneles de los Estudios Previos   |      |    |       |    |       |    | V      | V  |            |    |         |    |           |    |           |    |
| Acc2  | Reunión con el COAF ALAVA para explicar el proyecto AGREE y poder dar difusión del mismo entre sus asociados   |      |    |       |    |       |    | V      | V  |            |    |         |    |           |    |           |    |
| Acc3  | Plantear una atención personalizada a los vecinos en el barrio, 1 mañana a la semana (3 horas) para poder atender directamente a aquellos que quieran información de la rehabilitación de sus inmuebles  |      |    |       |    |       |    | V      | V  |            |    |         |    |           |    |           |    |
| ACTUACIONES   |  |      |    |       |    |       |    |        |    |            |    |         |    |           |    |           |    |
| ESTUDIOS PREVIOS                                    |  | MAYO |    | JUNIO |    | JULIO |    | AGOSTO |    | SEPTIEMBRE |    | OCTUBRE |    | NOVIEMBRE |    | DICIEMBRE |    |
| Entrega documento final                             | EP   |      |    |       |    |       |    | V      | V  |            |    |         |    |           |    |           |    |
| GESTIONES PREVIAS A LA DIFUSION (SUR)               | Análisis de datos personas interesadas en AGREE hasta la fecha. Clasificación de los interesados para obtener una agrupación (por tipologías y/o por cercanía entre edificios) para las sesiones informativas con el objetivo de asociarlas energías.                                      | CL   |    | CL    |    |       |    | V      | V  |            |    |         |    |           |    |           |    |
|   | Análisis ITEs presentadas de sus inmuebles - ¿defectos por subsanar?   |      |    |       |    |       |    | V      | V  |            |    |         |    |           |    |           |    |
|   | Reunión explicativa de los Estudios Previos a los presidentes de la Asociación de Adurta - San Cristóbal   | A    |    | A     |    |       |    | V      | V  |            |    |         |    |           |    |           |    |
| Hacia los ya INTERESADOS                            | Representados mediante Administradores de Fincas   |      |    |       |    |       |    | V      | V  |            |    |         |    |           |    |           |    |
|   | Comunidad de propietarios por sí mismos  |      |    |       |    |       |    | V      | V  |            |    |         |    |           |    |           |    |
|   | Folleto informativo en portales  | Acc1 |    |       |    |       |    | V      | V  |            |    |         |    |           |    |           |    |
| Hacia los NO INTERESADOS                            | Contacto con el Colegio Territorial de Administradores de Fincas de Guipúzcoa y Álava para difusión entre sus asociados información del proyecto AGREE   | Acc2 |    |       |    |       |    | V      | V  |            |    |         |    |           |    |           |    |
|   | Atención personalizada en local asociación (1 día por semana)  | Acc3 |    |       |    |       |    | V      | V  |            |    |         |    |           |    |           |    |
|   | Administradores de Fincas  | S4   |    |       |    |       |    | V      | V  |            |    |         |    |           |    |           |    |
| PROFESIONALES                                       | COAVN ALAVA / COAAT ALAVA  | S4   |    |       |    |       |    | V      | V  |            |    |         |    |           |    |           |    |
|   | INECA  | S4   |    |       |    |       |    | V      | V  |            |    |         |    |           |    |           |    |

- Planning actions dissemination of previous studies: Having an estimated cost of the renovation solutions is determinative in order to be able to make a decision about embarking on the refurbishment of the buildings, which is why the AGREE project includes the contracting of the technical preliminary projects by the SURs. A mechanism for the initial process of the energy and accessibility renovations projects of the buildings was developed through a Model of "Economic Justification Sheet of the actions to be proposed in each building" within the AGREE scope where the results are included. Accompanying actions: Once the preliminary projects were available, the SURs organised meetings to present the alternatives of the proposed solutions to the owners and, on the basis of this information, they could make decisions and reach agreements.

Reaching agreements between the people of the different communities of owners requires the SUR to accompany them through different meetings at neighbour level, the building and the dwelling, in order to resolve doubts, clarify issues and provide information on existing funds, on a personalised basis.

- Demand aggregation: To promote joint contracting and benefit from the economy of scale, during the selection of the project drafting teams a series of meetings and conversations were held between the SURs and the Association of Architects and Technical Architects of Gipuzkoa. A set of rules were prepared assessing not only fees, experience and deadlines, but also a discount for the aggregation of demand.
  - Financing/aid\_ Collaborating entities NextG Funds: In June 2022 according to the NEXT funds' order, the SURs assume the status of Collaborating Entities. As one-stops-shops, they become the point of information and processing of applications for aid and its resolution.
  - Agreements have been reached among the residents to perform the energy and accessibility renovations of the buildings.
- **Part 2. Improving replicability:** this part of the workshop was organized into different working tables in which to generate a space for discussion in small groups. Therefore, the exchange of ideas is sought to improve replicability

based on the identification of problems faced in the energy renovation processes:

1. The bureaucracy involved in the processing of grants for energy renovation
2. There is a lack of knowledge of the energy renovation process on the part of homeowners (and their responsibilities)
3. Financial support (subsidies and/or financing) does not arrive when it is needed.

The discussion tables followed the same organizational scheme. This is:

- o Presentation of the participants Who is who in 1 minute.
- o Sharing of the initial problem to be discussed assigned to each table.
- o **Why?** understand and define the problem, not solve it.
- o Going up and down wondering **"WHY?" and HOW?"** respectively, the scope of the investigation is expanded.

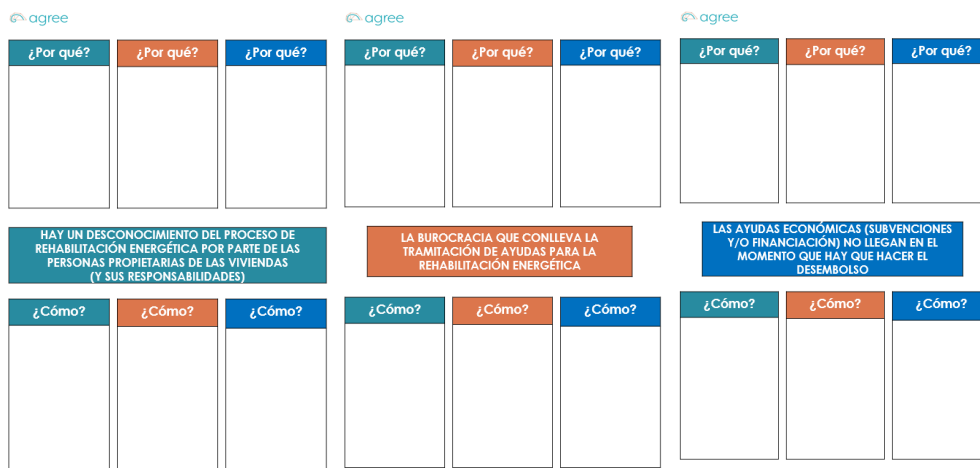


FIGURE 7. EXAMPLE OF THE SHEET GIVEN TO THE PARTICIPANTS

Once the final list of participants was clear, the final working table distribution was:

| WORKING TABLE 1<br>Lack of knowledge of the energy rehabilitation process on the part of the homeowners (and their responsibilities) |                                 | WORKING TABLE 2<br>The bureaucracy involved in processing aid for energy renovation<br>Financial aid (subsidies and/or financing) does not arrive at the time the disbursement must be made |                    |                                 |
|--|---------------------------------|---|--------------------|---------------------------------|
| BIDEBI   | TYPSA                           | ENSANCHE 21   | Private company    | Donostiako Etxegintza           |
| IHOBE  | DEBEGESA                        | Housing Director (Basque Govr.)   | Taper Architecture | Housing Director (Basque Govr.) |
| Independent professional   | Independent professional        | Amicyf Euskadi  | Architect          | Amicyf Euskadi                  |
| ENSANCHE 21  | Housing Director (Basque Govr.) | CasaGestio, SCCL  | Naider             | COAVN Bizkaia                   |
| Housing Director (Basque Govr.)  | Independent professional        | OA+ Architects  | OAR_COAVN Bizkaia  | SESTAO BERRI                    |



|   |                   |                                    |          |
|---|-------------------|------------------------------------|----------|
| Public Housing Society of Irún SAU (IRUNVI) | Taper Arkitektura | Grupo Investigación CAVIAR UPV/EHU | Tecnalia |
|---|-------------------|------------------------------------|----------|

#### *d. Results and verification*

Bureaucracy was identified as one of the main problems, specifically the following aspects were specifically identified:

- The amount of documentation required from residents is excessive, the compilation is difficult for many of the neighbours, it should be a simpler process.
- Furthermore, access to documents is difficult, they are not found quickly, and the digitization of information is a key solution.
- Interoperability problems, if the documentation has already been presented in some department of the public administration it should not be presented again in the rest.
- The list of documentation to be provided is not clear since sometimes corrections are requested to collect more documentation than was stated at the beginning.

It is emphasized that it is necessary to improve the friendliness of the telematic process, and a step-by-step manual may be included, so that you know when each thing is going to be requested.

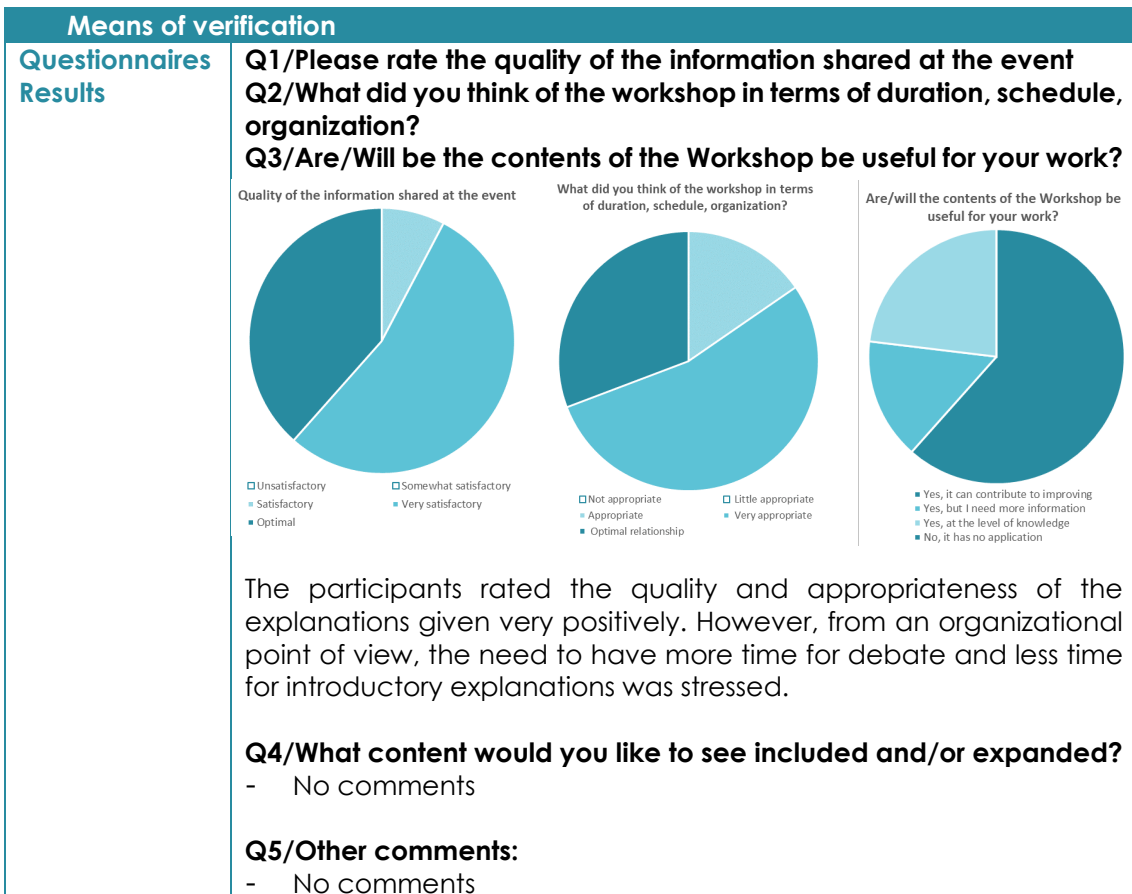
In relation to the financing, the first focus is on the delays that often accumulate when receiving renovation aid. On the other hand, the payment is not matched with the cash and payment flows of the process. The economic reality of households is also mentioned in relation to the established aid framework, specifically it has been seen that banks only give credit to those families with greater solvency, leaving out the most vulnerable households.

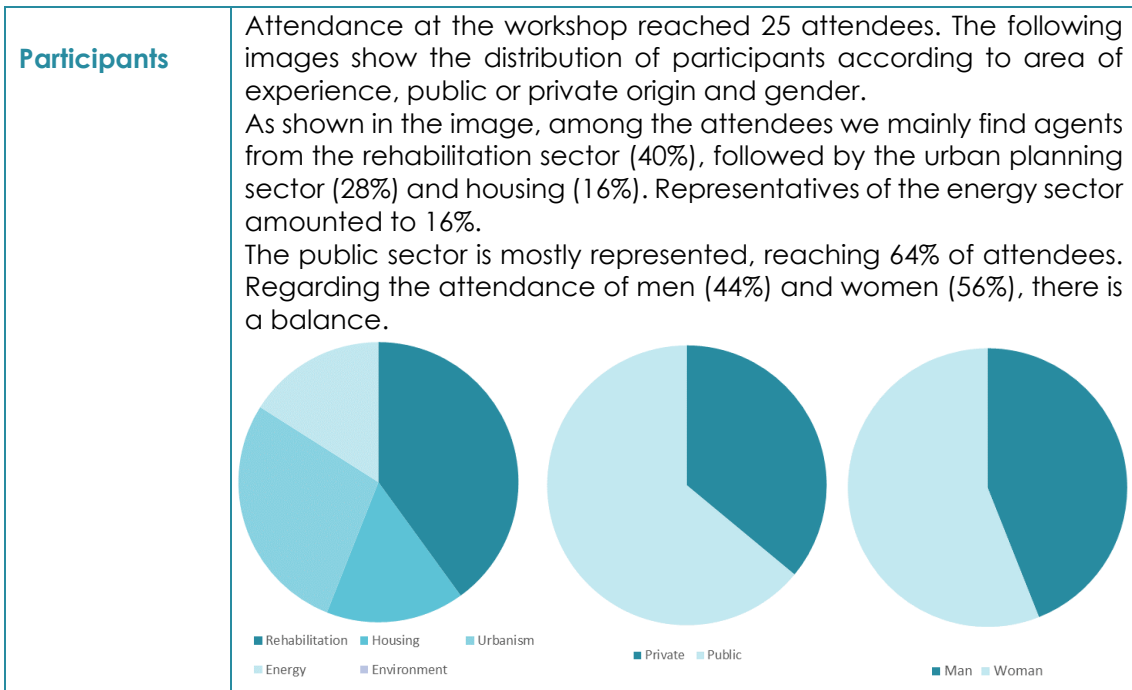
The lack of a professional sector that guarantees the most appropriate and viable solution for each community is a big issue. Ultimately, it is the owner who decides what technical solution is going to be developed, but in many cases this decision is not sufficiently informed.

Another topic of interest had to do with general awareness, specifically making owners aware of the conservation obligations and commitments that are acquired by being an owner.



FIGURE 8. SOME PICTURES FROM THE 2<sup>ND</sup> WORKSHOP





### 4.3 Other Reference Events

This section describes the reference events in which we have participated as part of the Agree Academy.

#### 4.3.1 International

Online\_19/10/2021\_ **Sustainable Energy Week\_ EUSEW 2021\_Extended Programme\_** Launched in 2007 by the EUSEW has been organized annually and since April 2021 by the European Climate, Infrastructure and Environment Executive Agency (CINEA), in close cooperation with the Directorate-General for Energy.

Tecnalia presented AGREE together with Opengela project and other examples to prove that a holistic approach in urban regeneration is key for recovery with high social impact, bringing wider benefits beyond energy efficiency when a neighbourhood approach is taken. (<https://eusew.eu/extended-programme-sessions/urban-regeneration-southern-europe-recovery-tool-high-social-impact>)

Vitoria-Gasteiz\_ 5/05/2022\_ **“Vitoria-Gasteiz towards climate neutrality: Horizon 2030”** \_ E21 technicians participated in this conference organized by the Center for Environmental Studies, CEA in the frame of the SmartEncity project.



Vitoria-Gasteiz is one of the three cities (together with Tartu, in Estonia, and Sondeborg, in Denmark) that participates in this European project, which seeks to develop the European strategy for the creation of smart cities free of CO<sub>2</sub>. In the case of Vitoria-Gasteiz, the project materializes through the energy renovation of the Coronación neighborhood and aspires to become a greener and more carbon-neutral city.

In this conference, attended by the mayors of different Basque municipalities, in addition to those of Zaragoza, Castellón or Toledo, technicians from E21 explained the development of the AGREE Project and the housing renovation policy being carried out by the Vitoria-Gasteiz City Council in neighborhoods built before 1980.

#### *Online\_21/06/2022\_ EUSEW 2023\_policy session*

This policy session was focused on social innovation as a key component in integrated building renovation of social and affordable housing. Such an approach entails assessing the needs of residents while promoting community engagement throughout the renovation project. In the framework of the Affordable Housing Initiative, the session will look at innovative methodologies and partnerships aiming to onboard relevant local stakeholders in renovation projects at the district level. The session will showcase alternative solutions to drive behavioural changes and will explore how co-creation mechanisms can deploy inclusive and sustainable neighbourhoods.

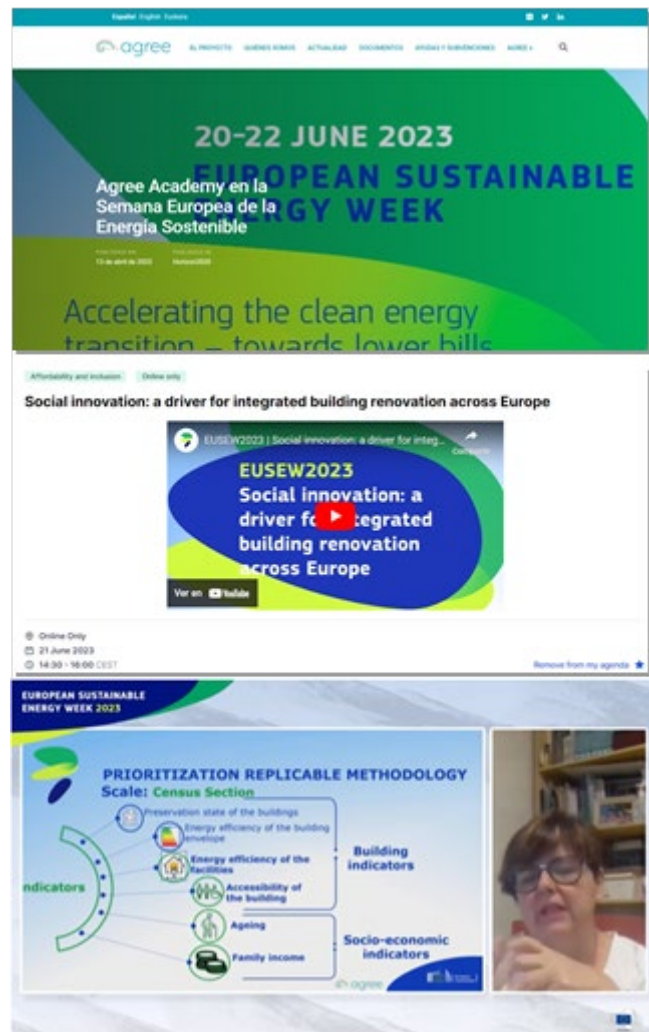


FIGURE 9. AGREE ACADEMY, EUROPEAN SUSTAINABLE ENERGY WEEK 2023.

Link to the video: <https://youtu.be/KRPrf08fHNI>

#### 4.3.2 National

- 17/11/2021\_Jornadas “Miradas a la Vivienda Productiva”, sesión “Intervenir en lo construido” \_Tecnalia shared AGREE’s methodology in the frame of planning and implementation of Local Urban Regeneration Strategies. (<https://avseuskadi.com/ponencias-17-11-2021/> )

#### 4.3.3 Regional

Europa Palace in Vitoria-Gasteiz 8/04/2022: "Technical-informative Conference on Housing Renovation and Available Help Lines". The session had a general approach and was aimed at those responsible for the neighborhood associations, the Association of architects, the Association of quantity surveyors, UNECA (Union of Construction Employers of Álava) and property administrations, with a participation of 50 people.



Technicians from E21 in their speech gave an account of the housing rehabilitation policy being carried out by the Vitoria-Gasteiz City Council and especially the AGREE Project. The presentation is available at: [https://www.vitoria-gasteiz.org/wb021/was/contenidoAction.do?idioma=es&uid=u\\_60ad4517\\_18004f23abc\\_\\_7f10](https://www.vitoria-gasteiz.org/wb021/was/contenidoAction.do?idioma=es&uid=u_60ad4517_18004f23abc__7f10)

The event was announced through a press release sent to the local media and to the Spanish Association of Public Housing and Land Managers.

The news was covered by media and radio stations in Vitoria-Gasteiz, on the AGREE and Ensanche 21 websites, as well as on all social networks.

- Durango, 6/05/2022\_ Berdeago exhibition\_ "One-stop-shops for renovation: The role of Urban Renovation Societies (SUR)" organized by AVS Euskadi\_ Donostia, E21 and Bidebi participated in a round table to present the methodology and action plan developed in AGREE to other SURs and peer-learning on the governance of renovation processes.



- Vitoria-Gasteiz, 30/06/2022: E21 participated in the annual meeting of the SEA – UNECA association, a union of Álava construction businessmen that, as a non-profit business organization, brings together companies in the construction sector of the Historical Territory of Alava.

- University of the Basque Country (UPV /EHU) summer Course: the commitment to the renovation of buildings and housing in the Basque Country (<https://agree-basquecountry.eu/curso-sobre-la-apuesta-por-la-rehabilitacion-de-edificios-y-viviendas-en-la-capv/>) (05/07/2022)



*First Regional Rehabilitation Forum 2023. National Association of Rehabilitation and Reform Companies (ANERR)*

This forum was sponsored by its partner Siber and was attended by Fernando Prieto (President of ANERR), Pedro Jauregui (Deputy Minister of Housing of the Basque Government), Jose Antonio González García (Head of economic and financial management, of the Planning Directorate and Housing Operational Processes of the Department of Territorial Planning, Housing and Transportation



FIGURE 10. FIGURE 9. AGREE ACADEMY, ANERR REGIONAL FORUM, BILBAO 2023

of the Basque Government), Don Jose Luis Lopez (Rehabilitation Agent of the partner company GEONOR), Maria C. Cocchiara (Technical Department of ANERR), Alejandro Barnechea Jayo (Bank Santander), Jorge Torres (Tecnalia) and Olatz Nicolas (Tecnalia), Pedro Parra (ANERR Coordinator).

Tecnalia, as a member of the Agree consortium, presented a presentation on how to promote investments in energy rehabilitation in the Basque Country through innovative mechanisms that enhance aggregation and improve governance.

The person responsible for economic and financial management, from the Department of Housing Planning and Operational Processes of the Department of Territorial Planning, Housing and Transport of the Basque Government, also as a member of the Agree consortium, highlighted the importance of the

different public aid available in Euskadi for energy rehabilitation and highlighted the work of the Urban Rehabilitation Societies and Visesa as collaborating entities to process the aid

The forum brought together companies and other actors in the rehabilitation industry, who learned from the Department of Territorial Planning, Housing and Transport of the Basque Government the different aid available

Date: 26<sup>th</sup> January 2023. Location: Bilbao Urban Sustainability Resource Center ([web](#)).