

Frequently asked questions on consumer information and advice for building energy renovation

By the Energy Advice Exchange, February 2017

In November 2016 the European Commission released its proposals for a package of measures to promote the clean energy transition in Europe, entitled 'Clean energy for all Europeans' and known as the Winter Package. The package, whose headline proposal is the introduction of a binding 30% energy efficiency target by 2030, proposes to put the consumer at the centre of the energy transition.

Consumer energy advisory services to promote energy refurbishment of buildings and energy saving behaviours can deliver against some of the headline priorities of the Winter Package, the European 'Efficiency First' policy model, and the proposed energy efficiency target.

Most European countries have been providing some form of energy advice since the oil crises in the 1970s. Yet, there is little consolidated understanding of what energy advisory services are for, what they can achieve, and how.

This Frequent Asked Question document aims to propose answers to some of the key questions and promote the discussion on energy advisory services. Being a FAQ, this document will evolve and be updated as new questions are posed and answers to these questions develop.

The basics

- **What is the Winter Package?**

The Winter Package is the short name for the package of proposals, officially named 'Clean energy for all Europeans' which was released on 30 November 2016.

The aim of the Winter Package proposals is to promote a consumer centred clean energy transition in Europe, keeping the Union competitive and promoting jobs and growth. The three headline goals of the Winter Package are: putting energy efficiency first, achieving global leadership in renewable energies and providing a fair deal for consumers.

The legislative proposals cover energy efficiency, renewable energy, connected and automated mobility, eco-design, the design of the electricity market, security of electricity supply and governance rules for the Energy Union.

The publication last year of these proposals begins a negotiation process which will likely take around 2 years. The European Council and Parliament will now negotiate the proposed texts before they are finally agreed and come into force.

More information

Find all of the European Commission Winter Package proposal documents here:

<http://ec.europa.eu/energy/en/news/commission-proposes-new-rules-consumer-centred-clean-energy-transition>

- **What are energy advisory services?**

For decades Member States have had various forms of energy advisory services to support their energy efficiency strategies, Sweden has for example been providing energy advice to citizens for 40 years.

However, there is no definitive description of what energy advisory services consist of¹, so in practice there is a wide range of interpretations of what advisory services mean. There is also no acknowledgement of the priority that energy efficiency strategies should give to such a service.

One definition of 'one stop shops' for energy advice, developed for a study on energy efficiency advisory services and one stop shops for France's national energy agency, Ademe and World Energy Council² is relevant:

*"Packaging and providing energy efficiency related **advice and services**, such as technical, financial and/or installation, in one place to one or more audiences (primarily consumers and members of the service supply chain) that is relevant to how that audience plans to improve its energy performance. The central*

¹ Not even the International Energy Agency has devoted any attention to energy advisory services.

² <https://www.wec-policies.enerdata.eu/Documents/cases-studies/WEC-case-study-one-stop-shop.pdf>

programme/project design aim is to create a convenient and interactive means for the target audience(s) to receive relevant advice and take advantage of multiple, energy-related services at one time.”

Levels of information or advisory service can also be illustrated on a spectrum from broad, generic messaging through to full support in both decision-making and implementation.

Awareness raising →	Information provision →	Advice →	Practical facilitation/assistance
(one-way, mass audience generic information)	(one-way, mass audience – generic or individual - bespoke)	(two-way)	(implementation services)

The European energy efficiency policy package documents make reference to aspects of advisory services in various ways, using terms such as promotion, stimulation (to take action), awareness-raising, information, and advice. There is also a degree of confusion and potential overlap between advisory services, energy audits, and energy performance certificates.

More information:

The most extensive review to date of energy advice in Europe carried out by the SERENADE (Sharing Expertise in Energy Advice Across Europe) project (2007). The project developed working definitions as a basis for a review of energy advice in Europe. More here: <https://ec.europa.eu/energy/intelligent/projects/en/projects/serenade>

- **Why are energy advisory services important to achieving Europe’s energy and climate goals?**

A significant barrier to renovation of buildings, recognised as essential to achieving the proposed energy efficiency target of 30% by 2030, is the consumers’ lack of information and awareness what constitutes an ambitious energy renovation, how to go about it and what the benefits are.³

Advisory services create consumer awareness that leads to increased demand for ambitious energy renovations, can overcome market barriers and distortions from a malfunctioning market, secure actual delivered energy and carbon savings through supporting renovations and behavioural changes to completion and maintenance, and address social inclusion and fairness. Advisory services also act as the ‘glue’ between other policy interventions like incentives, legislation and standards, certification, funding and finance.

Energy advisory services and the existing European policy package

- **Does European policy require Member States to ensure information or advisory services are provided for consumers?**

Two EU Directives hold the main responsibility for promoting energy saving in buildings and building renovation: the 2010 Energy Performance of Buildings Directive and the 2012 Energy Efficiency Directive.

Across these two Directives there are a relatively large number of provisions that promote information provision to consumers, either directly or indirectly. However, the provisions are piecemeal and contain unhelpful crossover and duplication. Three Articles across the two directives promote seemingly similar generic information provision or awareness-raising:

- Article 12 of the EED on **Consumer information and empowerment programme**
- Article 20 of the EPBD on **Information**
- Article 17 of the EED on **Information and training**

Bespoke information, however, is limited to the provision of technical information through Energy Performance Certificates (EPCs) (Article 11 of the EPBD) and audits (Article 8 of the EED). Importantly, the provision of assistance and advice at the final ‘action’ stages of the consumer journey, when the consumer makes their final decisions, commissions works and monitors the outcomes, is missing from the Directives.

More information:

³ The barrier of consumer information/awareness was well recognised in the National Renovation Strategies, with 11 of the 13 strategies that covered barriers naming consumer information as one of the main barriers. Further, the Commission’s 2016 Heating and Cooling Communication makes the significant statement that owners often lack advice on technical possibilities.

See Annexe 1 in Energy Advice Exchange's Discussion Paper on energy advisory services here https://energyindemand.com/energy-advice-exchange/efficiency_first_means_consumer_first_discussion_paper_final_updated_jan_2017/

- **What role do information or advisory services play in the Renovation strategies drawn up by member states?**

Member States are required by Article 4 of the Energy Efficiency Directive to draw up National Renovation Strategies on a regular basis. The Guidance to Member States on how to write these strategies provides categories of policies and measures that Member States might include:

- *Regulatory (EU, national, regional and local*
- *Fiscal (tax incentives, grants, subsidies, loans, etc.)*
- **Information campaigns (editor's bold)**
- *Labelling (e.g. EPCs etc.)*
- *Voluntary agreements*
- *Other*

In this categorisation awareness, information and advice measures are defined as 'Information campaigns', limiting the ambition to one-way awareness raising or information activities and as 'campaigns' implying time-based (short-term) initiatives rather than sustained provision.

The majority of the resulting Renovation Strategies fail to present convincing information and advice policies for consumers. Of the first iterations of the strategies (2014) only 8 strategies mentioning a policy that has the potential to guide a consumer through the renovation process. 7 of the 28 fail to mention any policy relevant to consumer awareness or information, a further 6 mention policies that are limited to only awareness raising measures.

More information:

The briefing written by Energy Advice Exchange provides a summary of the relevant provisions in each strategy, here https://energyindemand.com/energy-advice-exchange/energy_information_and_advice_in_national_renovation_strategies_briefing_note_100117/

- **Do other European initiatives or policies fill the role of energy advisory services?**

The tool most commonly pointed to as providing bespoke information to a consumer on a specific building is the Energy Performance Certificate (EPC).

The EPC is required by the EPBD (Article 11) to be produced when a building is sold or rented (Article 12) and has a life of up to 10 years. The tool's primary purpose is as a comparison tool but it is also required that recommendations of cost-optimal or cost-effective improvements be included with the certificate and an indication of where the owner or tenant can receive more detailed information.

Although potentially effective as a 'trigger point' for engaging an owner or tenant of the building to consider renovation works, the technical information in the EPC alone is insufficient to provide the bespoke information needed to design and implement renovation. Furthermore, the EPC is made impotent in a deep renovation by the requirement for recommendation of works to be cost-effective or cost-optimal. Advice and support services in addition to the EPC, that enable the EPBD's requirement that the EPC signposts further help to be fulfilled, are needed.

Energy audits, that the EED (Article 8) requires member states to promote to final energy users, are the second tool to provide bespoke building energy information. However, the energy audit, similar to the EPC provides only technical information to the consumer and needs to be coupled with further financial, legal, practical, behavioural and cost-benefit advice and assistance to enable renovations, particularly complex deep renovations to take place.

A newer European initiative, called the Building Renovation Passport (proposed by BPIE⁴) takes bespoke building information to another level by outlining a long-term (up to 15 or 20 years) step-by-step 'renovation roadmap' for a specific building, resulting from an on-site energy audit. The roadmap looks at the building as a whole and proposes the installation of measures in a specific order to ensure that future stages of renovation are not precluded or made more difficult.

⁴ <http://bpie.eu>

- **How do you measure the impact of energy advisory services?**

Monitoring and evaluation of energy advisory services are essential to check quality of delivery, maintain relevance of approach and to inform improvements and developments. Evaluation is also needed to provide evidence of the value of energy advice, and justify investment. However, as in all policy evaluation there is a balance to be struck between the cost and robustness of the evaluation.

Advisory services typically record firstly, customer satisfaction and feedback on the service and secondly the actions taken as a result of advice, then using 'deemed' outcomes for these actions (deeming is where a pre-calculated standard energy or carbon saving is allocated to an action).

More information:

For a more in-depth discussion of evaluation and the challenges in effective evaluation of advisory services see the report Case study on evaluation of energy efficiency advice centres and one-stop-shops. Here <https://www.wec-policies.enerdata.eu/Documents/cases-studies/WEC-case-study-one-stop-shop.pdf>

The evaluation regime undertaken for the French PRIS scheme (referenced <https://www.wec-policies.enerdata.eu/Documents/cases-studies/WEC-case-study-one-stop-shop.pdf>) is an example of a moderate but useful approach. See a case study in Annexe 2.

Energy advice services in the proposed new Winter Package

- **Do the proposals in the Winter Package affect how advisory services will be delivered?**

The winter package is largely silent on the provision of advice or information to consumers.

It makes no changes to the majority of articles across the EPBD and EED that provide for either direct or indirect information provision to the consumer. The only change the proposed package makes to a relevant Article is to remove the requirement for air condition and heating system inspections where a building automation or monitoring system is in place. The system inspections required by Articles 14 and 15 of the EPBD, were to be followed up by an inspection report (Article 16) which contained recommendations on improvements to the system. Therefore, the loss of this requirement removes one potential information trigger point for action.

Two further changes are of minor relevance to information to consumers on building energy renovation. The first is a proposal within the Renewable Energy Directive which requires (in Article 16) Member States to set up administrative contact points (described as one-stop-shops) for permitting of renewable energy installations with the aim of simplifying the administration for consumers around installations.

The second is a proposal in the Smart Financing for Smart Buildings initiative which promotes the establishment by Member States of local 'one-stop-shops' to support project developers to aggregate project portfolios to make them bankable. This assistance however appears to stop short of support to the actual consumer or building owner.

More information

Find all of the European Commission Winter Package proposal documents here:

<http://ec.europa.eu/energy/en/news/commission-proposes-new-rules-consumer-centred-clean-energy-transition>

- **What can be done to revise Energy Efficiency Directive and the Energy Performance of Buildings Directive as part of the Winter Package changes?**

The Energy Advice Exchange has developed a series of simple recommendations designed to improve the delivery of energy information and advice:

Improving definitions and renovation advice strategy

- A definition of advisory services and 'one-stop-shops' should be included in the revised EPBD (the Commission's definition of a one-stop-shop for project developers under its Smart Finance for Smart Buildings proposals would be a useful starting point);

- In line with the Commission's objective to streamline provisions in the EPBD, the overlapping information requirements of the EPBD and EED (specifically the 'generic information' requirements in EED Articles 12, 17 and EPBD Article 20) should be consolidated and clarified;
- A new approach to information and advisory services should include a requirement in the EPBD for a robust strategy for information and advice provision to consumers on technical, legal, financial and behavioural issues; and clear requirements for relevant stakeholders in the market (at a minimum, energy auditors, contractors, installers, financial institutions) to provide information to consumers;
- This new information and advice strategy should emphasise advisory services that assist consumers at the 'action' stages of a renovation, and encourage future stages of renovation. This could be delivered effectively through a 'one-stop-shop' approach;
- The new requirements should be specific and measurable and stipulate that advice services must be evaluated regularly and evaluation reports published;

Changes to specific Articles

- The Winter Package extends the requirement for Member States to deliver 1.5% energy savings under the Energy Efficiency Obligation Scheme to 2030. It also reinforces the opportunity for Member States to choose 'alternative measures' to the Obligation to deliver their energy saving target. Alternative measures include (EED Art 7 [9f]) 'training and education' and 'energy advisory programmes' but these should be listed as separate policy measures in recognition of their vastly different objectives and audiences.
- The value of the EPC as a consumer information tool should be increased by requiring a long-term renovation plan for the building, which can be updated over time in EPBD Article 11 (2). The quantitative assessment of the building would be used as the basis for developing a long-term renovation plan for the buildings, which can be updated as changes are made and handed on a change of ownership or occupancy.
- The Winter Package proposes that the requirement for Member States to draw up a long-term building Renovation Strategy is transferred from the EED (Art 4) to the EPBD (Art 2a) and the Renovation Strategies will become part of the new national Energy and Climate Plans. As part of these changes the opportunity to improve the conceptualisation and presentation of information and advisory services should not be lost:
 - EPBD new Article 2 should be reworded to increase the focus in the Renovation Strategies on the whole policy framework beyond stock data/technical potential and finance provision, to include energy advisory services.
 - To support investment by consumers, the new Article should include a requirement for mechanisms to provide advisory services to facilitate deep, staged renovations and the transition to 'smart', integrated buildings.
 - The Commission's [guidance](#) on the National Renovation Roadmaps should provide for a more comprehensive elaboration on "policies and measures" (EED Article 4(c)). In particular, point 3((a)iii) which defines the need for an appraisal of "Information campaigns" should be changed to read "*Information and Advice services for consumers*".

A resource should be created for member states to design advisory programmes; and as a first step, establishment of a working group under the three relevant Concerted Actions (EPBD, EED and RES) to explore options.

About energy advisory services

- **What types of advice do consumers need to achieve a deep energy renovation of their building?**

The types and content of advice that need to be provided to consumers is directly related to 1) the macro outcomes desired and 2) the individual needs of the consumer.

The macro outcomes at the European level are the decarbonisation of the building stock and the step change in building renovation that is needed to achieve this. At the next level the macro outcomes might be the defined outcomes of the local programme – whether these might be fuel poverty reduction, health benefits, positive economic impact etc.

The consumer will need advice on a combination of all or some of the below:

- Technical
- Financial/funding

- Legal/regulatory
- Behavioural
- Access to tradespeople
- Benefits – financial, health, comfort etc

Therefore, a full advisory service needs to combine a vast range of professional and ‘non-professional’ services.

- **When do consumers need advice to enable them to carry out deep renovation of their buildings?**

Advice provision is unlikely to be a one off event. A building owner has a journey to take to carry out a renovation and advice and support may be needed at several stages through this journey - from an initial raising of awareness, through identification of technical measures, reviewing the costs and benefits, working out how and when to do the work, and adjusting user behaviour to maximise the positive impact, and maintaining this impact.

The most important of these opportunities might be any combination of:

- When a consumer wants to do an energy renovation – this may be when awareness or demand for renovation has been created through a campaign
- When a consumer wants/needs to do a general renovation – and there is an opportunity here to ensure that all relevant energy measures are taken
- When a consumer wants/needs to reduce energy bills/improve thermal comfort/deal with damp and poor air quality associated with low temperatures
- When a consumer wants/needs to undertake a single or a series of RMI works
- When a consumer needs to make a distress purchase of a building element of system (eg boiler, windows, roof, etc.)

There are further trigger points created by regulations that are opportunities to provide advice. These include the provision of an Energy Performance Certificate on the sale or lease of a building, the inspection of a heating system or other building system or other mandated maintenance or inspection occasions.

- **How is energy advice delivered?**

How energy advice is delivered will be dependent on key factors of the service – the goals of the advice service (e.g. energy efficiency, renewable energy deployment, fuel poverty reduction etc.), the target consumers, the organisation delivering the services, the framework of support measures (incentives, loans, grants etc.) and shape of the industry that will install the measures.

Typical methods of engagement and services provided include: written information sent out often with energy bills; telephone helplines; e-mail or web-based assessment and enquiry services; face-to-face advice in local centres, stands in public spaces such as trade fairs, shopping malls or within municipal buildings; home visit personalised advice; energy audits and surveys, involving site visit and quantification.

The level of service provided is a key question. Services may range from a front-line service which, through answers to simple questions, simply ‘signposts’ on or provides standard information to more specialist support, through to detailed technical surveys, support through the process of getting works done and medium to long term user behaviour change programmes.

- **Who is best placed to provide effective and trustworthy advice for consumers undertaking energy renovations?**

Advice needs to be offered by a trusted organisation, which is very often local to the consumer and is supported by national coordination.

Advice needs to come from an organisation or an individual that the consumer will trust and national contexts define which types of public, private or third sector organisations are most trusted. Independence of the advice provider, particularly

from commercial benefit, can be a key feature in creating trust and in ensuring that the consumer receives advice that is most appropriate to their situation, goals and needs, and reflects the full range of options available to them.

In practice, energy advisory services in place in Europe are largely supported by public institutions with energy agencies playing a significant role. Front line services can be delivered in partnership particularly with municipalities, consumer organisations, third sector environmental or energy organisations.

The advice needed for deep energy renovation, which will likely include building visits and audits linked to face to face consultation, is therefore most likely to be delivered most effectively locally.

In practice advisory services with national coverage can be effectively delivered through a network of local advisory services, supported by a national advice line and website. Nationally coordinated local services benefit from referrals, full coverage and lesson sharing.

More information:

One of the most well developed and long standing advice services is delivered in France through a national network of local advice centres. Find out more about France's Point Renovation Info Service in a case study in appendix to the WEC report here: <https://www.wec-policies.enerdata.eu/Documents/cases-studies/WEC-case-study-one-stop-shop.pdf>

- **Who other than consumers (building owners, landlords, tenants and intermediaries) needs advice?**

One feature of building renovation projects is the wide variation in the way projects are organised in practice. Therefore, the key stakeholders and actors in the process vary considerably. It is important that the multiple stakeholders in the process have access to broadly consistent information to avoid conflicting messages and advice.

The level of information required by the key stakeholders will be heavily dependent on the maturity of the sustainable energy market in the relevant country.

The main stakeholders beyond the consumer that need to have consistent information, contacts or referrals are building trades, builders' merchants and DIY stores and others that are key points of contacts in RMI works. For more extensive works and works in more complex buildings facilities or building managers, building inspectors, planning control and architects, designers and structural engineers are other key points of consumer information.

- **What is a one-stop-shop?**

A one-stop-shop is a service or location that offers a multitude of services to a client or consumer. The idea is to provide a convenient and efficient service.

Most relevant to a one-stop-shop for energy advice are the critical ingredients: technical and social expertise, practical experience, social awareness, communication skills and commercial independence.

A one-stop-shop is of particular relevance in the complex and lengthy deep renovation process as it is essential to ensure that the consumer is not 'lost' whilst being passed from one service to another in pursuit of all of these ingredients. A one-stop-shop allows the consumer to be supported through the whole 'journey' to installation and post installation user behaviour (change) from within one service.

The one-stop shop also enables all data that is collected on the needs and situation of the consumer and from the building assessment to be held centrally and made be available to advisers, installers and the customer themselves – and for it to be easily updated as changes are made. Furthermore, evaluation and lesson learning of the service and impacts benefit from the centralisation of data.

- **Where can I look for examples and experience of energy advisory services in practice?**

The study carried out by Energy Advice Exchange for France national energy agency, Ademe and the World Energy Council contains case studies from Europe and the rest of the world on one stop shops for energy efficiency. You can find the case studies here: <https://www.wec-policies.enerdata.eu/Documents/cases-studies/WEC-case-study-one-stop-shop.pdf>.

Energy Advice Exchange has also written a briefing summarising the policies and measures relevant to consumer awareness, information and advice in the 2014 National Renovation Strategies. You can find it here:

https://energyindemand.com/energy-advice-exchange/energy_information_and_advice_in_national_renovation_strategies_briefing_note_100117/

Further case studies will be developed in the first half of 2017 and will be shared on the Energy Advice Exchange website here: <https://energyindemand.com/energy-advice-exchange/>

Where can I get more information?

This FAQs document is written by Energy Advice Exchange.

Energy advice Exchange is an informal discussion group, which aims to bring together a wide range of actors who appreciate the need for a higher priority for the provision of energy advice. Energy Advice Exchange is [Rod Janssen](#), [Catrin Maby](#) and [Louise Sunderland](#). Find out more about the team [here](#).