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Sustainable Energy Retrofit Process Management for Multi-Occupancy Residential Buildings with Owner Communities

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European foreword

CWA 17382:2020 was developed in accordance with CEN-CENELEC Guide 29 "CEN/CENELEC Workshop Agreements – The way to rapid agreement" and with the relevant provision of CEN/CENELEC Internal Regulations – Part 2. It was agreed on 2019-11-26 in a Workshop by representatives of interested parties, approved and supported by CEN following a public call for participation made on 2018-05-28. It does not necessarily reflect the views of all stakeholders that might have an interest in its subject matter.

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Introduction

Because of the need to involve multiple co-owners, decision making for refurbishment is more complex and slower in multi-occupancy residential buildings with owner communities (MOBs) than in single-owned buildings. This can lead to refurbishment projects not starting, not proceeding or being cancelled. With the need for a significant increase in the renovation and success rate of the existing residential building stock to achieve EU's energy efficiency targets it is vital that decision making for suitable energy retrofit is executed more efficiently.

It is widely recognised that the necessary technologies to retrofit the residential building stock in the CEN member states to a high standard are already available. The challenge the current CWA intends to overcome is the non-technical socio-economic component of the energy retrofit process. Based on the experience gathered by the CWA working group members from various relevant national and international projects¹ the most significant barriers for the success of the energy retrofit are the suitable information provision and the owner engagement.

The (often large numbers of) co-owners in an owner community (OC) have individually very different expectations and wishes for the future of their building, and, accordingly they weight costs and benefits of refurbishment actions very differently. Thus, it is very difficult to develop a concept that corresponds to the expectations of all co-owners. Because of this decision making barriers, currently, the initial phase of the energy retrofit process, from the initial idea to decision making, lasts on average three years. The process proposed in the current CWA focuses on the optimisation of this initial phase and envisages a duration of one year. It proposes structuring the information collection and workflow, so that the energy retrofit options can be fully analysed, recognising the different interest and priorities of different co-owners, and then presented for agreement by the owner community.

The proposed initial phase process is broad and flexible and is intended to work complementary to different support programmes which already exist, in order to help co-owners of MOBs to implement energy improvements. In summary, the key elements which this process requires are as follows:

- Increase awareness, education of the OC and provide information about inventiveness
- Development of a retrofit roadmap which identifies retrofit opportunities for the building;
- A “custodian” (sponsor or champion) for the retrofit roadmap development from within the building’s co-owner community or property management team;
- An informal consultation process with co-owners to find out their views on the energy retrofit roadmap; and
- A clear decision stage where the owner community agrees to adopt some or all of the recommendations of the roadmap.

This document is meant to describe the proposed initial phase process and by this to support its stakeholders to overcome the barriers of complex governance arrangements in multi-occupancy residential buildings which are recognised in Article 19 (1) of the original Energy Efficiency Directive 2012/27/EU, and confirmed in the updated directive 2018/2002.

In this document, the following verbal forms are used:

- "shall" indicates a requirement;

¹ Significant inputs on this topic were gained during the Horizon 2020 project SMARTER TOGETHER (691876) where the energy efficiency in residential buildings is one of the five key topics.

- "should" indicates a recommendation;
- "may" indicates a permission;
- "can" indicates a possibility or capability.

1 Scope

This CEN Workshop Agreement (CWA) specifies a workflow and an overall quality and process management methodology for the initial (engagement and decision making) phase of the retrofit process in existing multi-occupancy residential buildings with owner communities in CEN member states.

This CWA targets all relevant stakeholders in the initial phase of the energy retrofit process including owner communities, property and facility managers, owner community management boards, planners, energy efficiency consultants, financial institutions, and policy makers.

2 Normative references

There are no normative references in this document.

3 Terms, definitions and abbreviated terms

3.1 Terms and definitions

For the purposes of this document, the following terms and definitions apply.

ISO and IEC maintain terminological databases for use in standardization at the following addresses:

- IEC Electropedia: available at <http://www.electropedia.org/>
- ISO Online browsing platform: available at <http://www.iso.org/obp>

3.1.1

owner community

OC

group of co-owners who may be legal or physical persons

3.1.2

co-owner

owner of an apartment, share or freehold in a multi-occupancy building

3.1.3

landlord co-owner

co-owner who is not resident in the MOB, instead renting out the apartment they own. A landlord co-owner may own multiple apartments in the same building

3.1.4

co-owner occupier

co-owner who is resident in the MOB

3.1.5

common parts

spaces or building elements of the building not within the jurisdiction of an individual apartment owner