Working Group Survey

Results | 30.09.2021

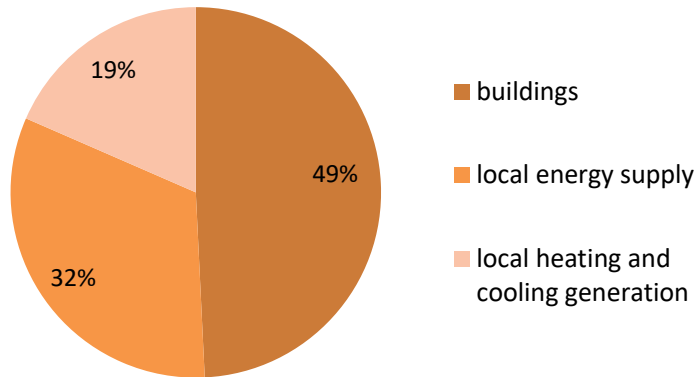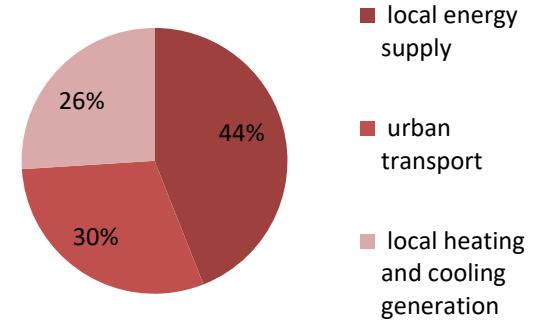# Municipal representatives participating

For all questions
- DE survey: min 34 municipal respondents, max 62
- EN survey: min 5 municipal respondents, max 9
- BG survey: min 0 municipal respondents, max 2
- ES survey: 3 municipal respondents
- FR survey: 0 municipal respondents

Municipal climate action priorities

Climate action priority #1

- buildings — 49%
- local energy supply — 32%
- local heating and cooling generation — 19%

Climate action priority #2

- urban transport — 44%
- buildings — 29%
- urban planning — 27%

Climate action priority #3

- local energy supply — 44%
- urban transport — 30%
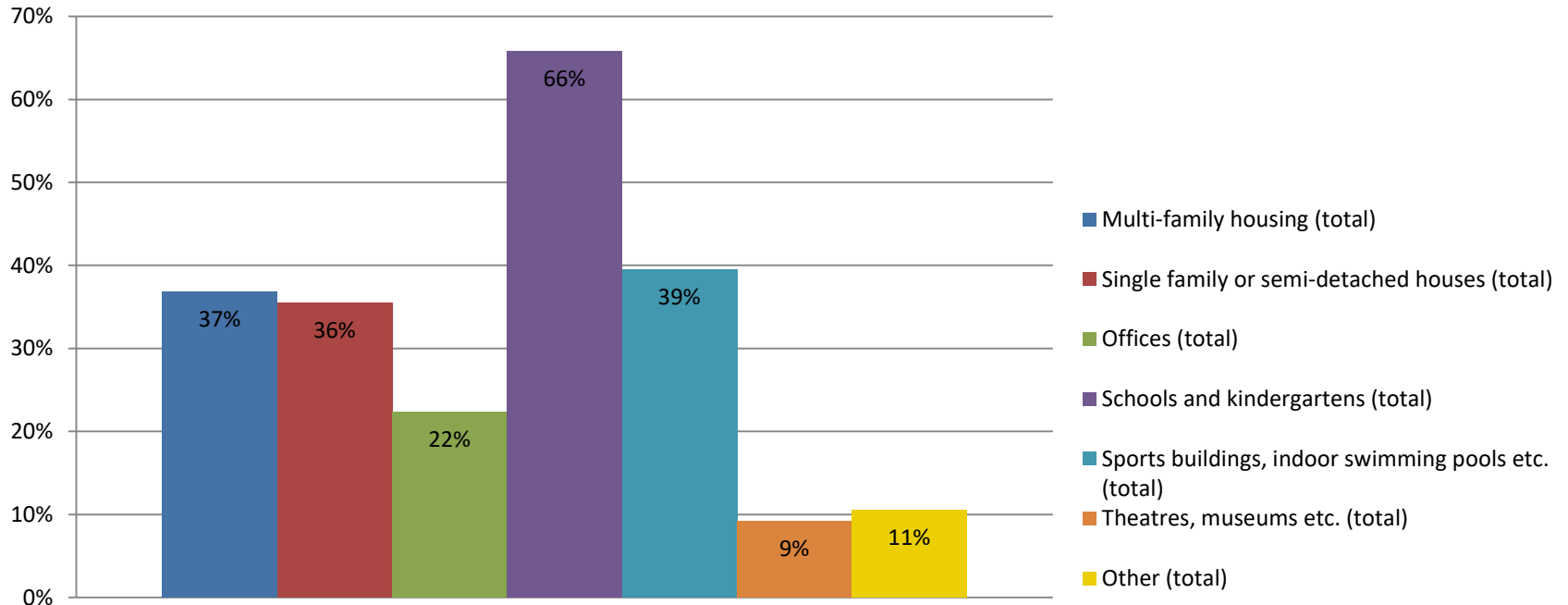- local heating and cooling generation — 26%
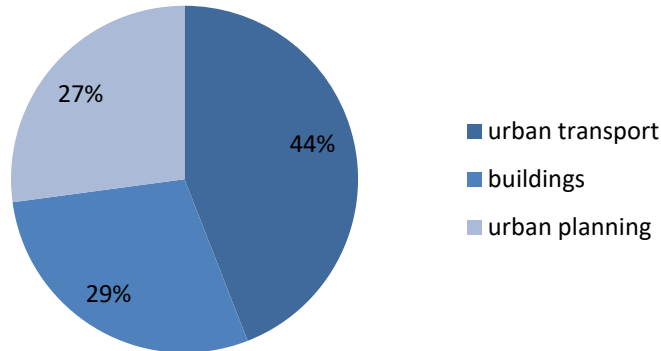
Municipal climate action priorities

- 49% rate buildings as the #1 priority, 29% as second priority
- For 44% transport was the #2 priority, for 30% it came in 3rd
- Local energy supply and heating and cooling generation also ranked highly, with both together ranked as the #1 priority by 51% and as the #3 priority by 56%

Generally, the topic of buildings ranks as the top priority as does energy generation.

Buildings types

On what building types do municipalities focus?

- Multi-family housing (total)
- Single family or semi-detached houses (total)
- Offices (total)
- Schools and kindergartens (total)
- Sports buildings, indoor swimming pools etc. (total)
- Theatres, museums etc. (total)
- Other (total)

Chart values: 37%, 36%, 22%, 66%, 39%, 9%, 11%

Ownership types

On which ownership types do municipalities focus efforts?

- Private buildings in general (those owned by citizens, businesses)
- Public buildings in general (the municipality's own buildings)

37%

95%

Building types
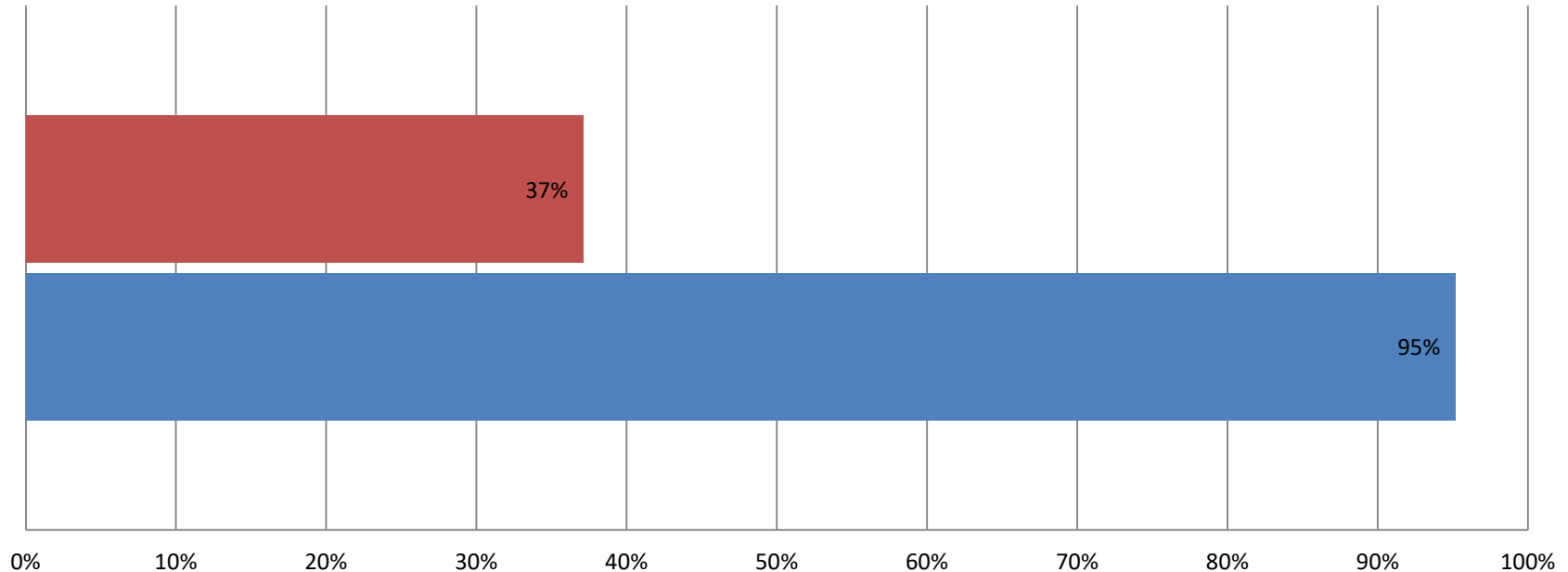
- 95% concentrate on public buildings, 37% on private
- Of these, 66% on schools and 39% on sports facilities
- Only 36 and 37% focus on residential (single/semi-detached and multifamily respectively).

Take home point: Focus on public buildings, especially schools and sports facilities.

Goals and targets

Which goals are important when it comes to buildings?

Category	Value
Other	15%
regional strategy	19%
municipal strategy	42%
national law	52%
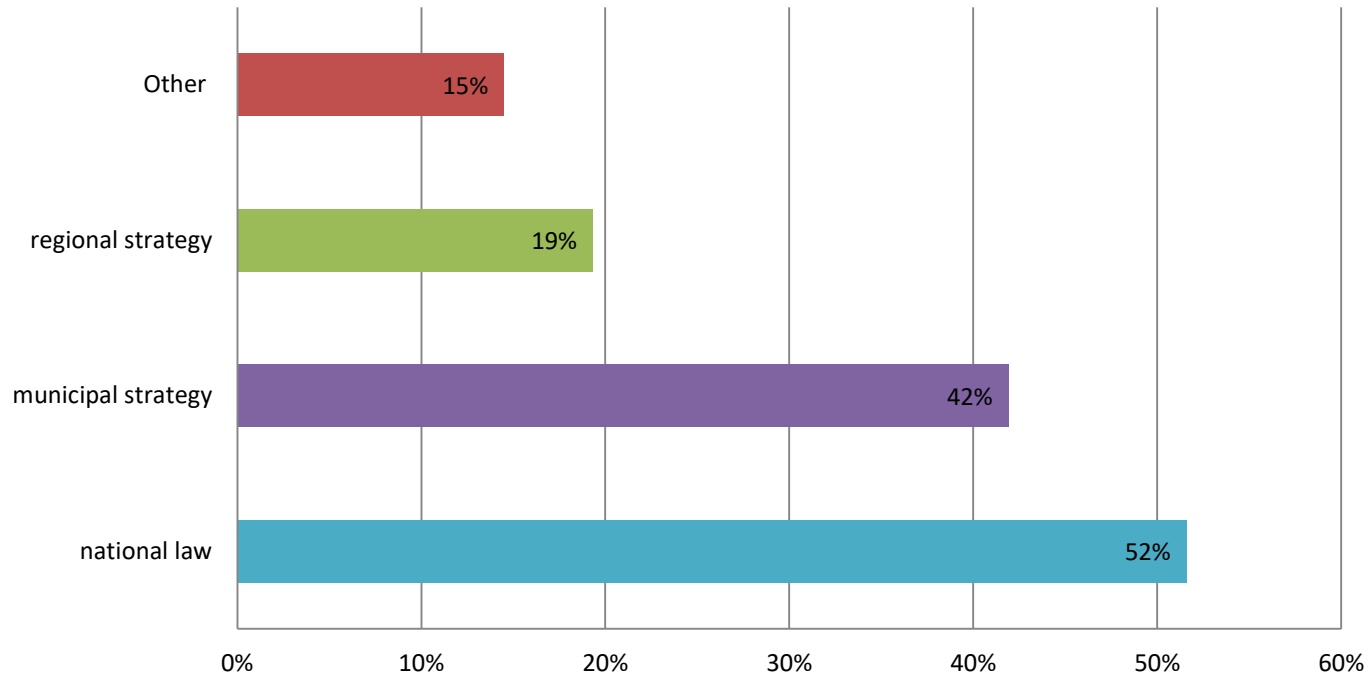
Key measures for reaching goals

	Funding schemes	Energy consulting services	Informational materials	Professional development and training	Comms campaigns	Timing retrofits w/ maintenance	QA and/or monitoring
Essential	75%	61%	24%	55%	33%	47%	30%
Less essential	16%	25%	25%	18%	28%	33%	35%
Good to have	7%	7%	37%	20%	26%	15%	33%
Somewhat important	2%	5%	10%	5%	9%	2%	0%
Not so important	2%	3%	3%	2%	5%	3%	2%

Goals

- 52% cite national law as being important BUT a surprising 42% of respondents cite their own municipal goals!
- In reaching these goals funding (75%), energy consulting (61%), training (51%) and timing (47%) are seen as most essential

Funding is key but also very country specific.

outPHit can provide information regarding energy consulting, training and the timing of retrfotting measures.

Key players

Key municipal decision makers on buildings

- Other (total): 25%
- The energy department (total): 17%
- The environmental department (total): 30%
- The finance department (total): 33%
- The building department (total): 53%
- The mayor (total): 60%
- The municipal parliament (total): 55%
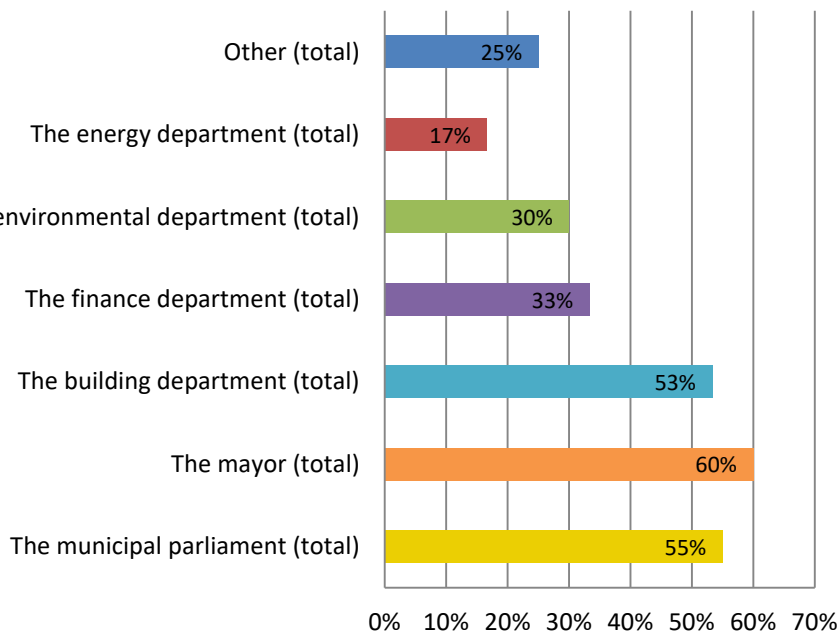
Key players in carrying out decisions on buildings

- The building department (total): 83%
- External architects and engineers (total): 64%
- Private consultants (total): 15%
- Local housing associations (total): 27%
- Other (total): 19%

Key players
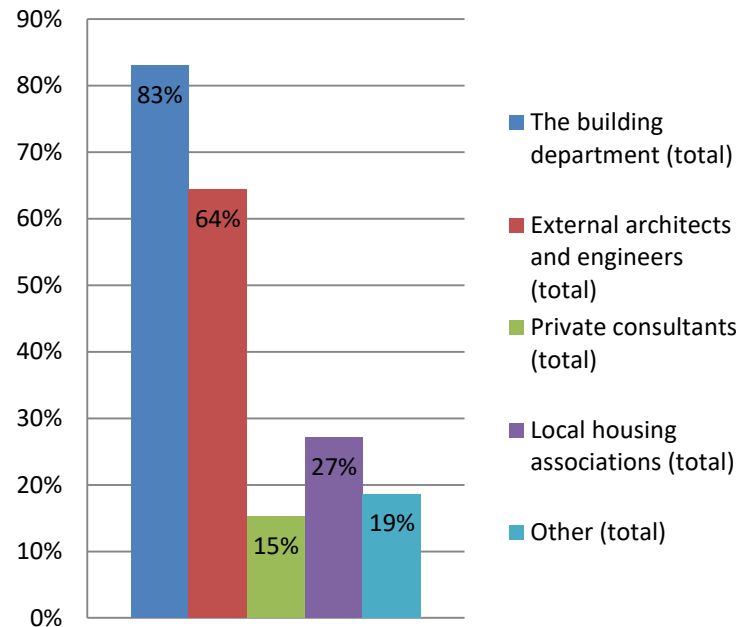
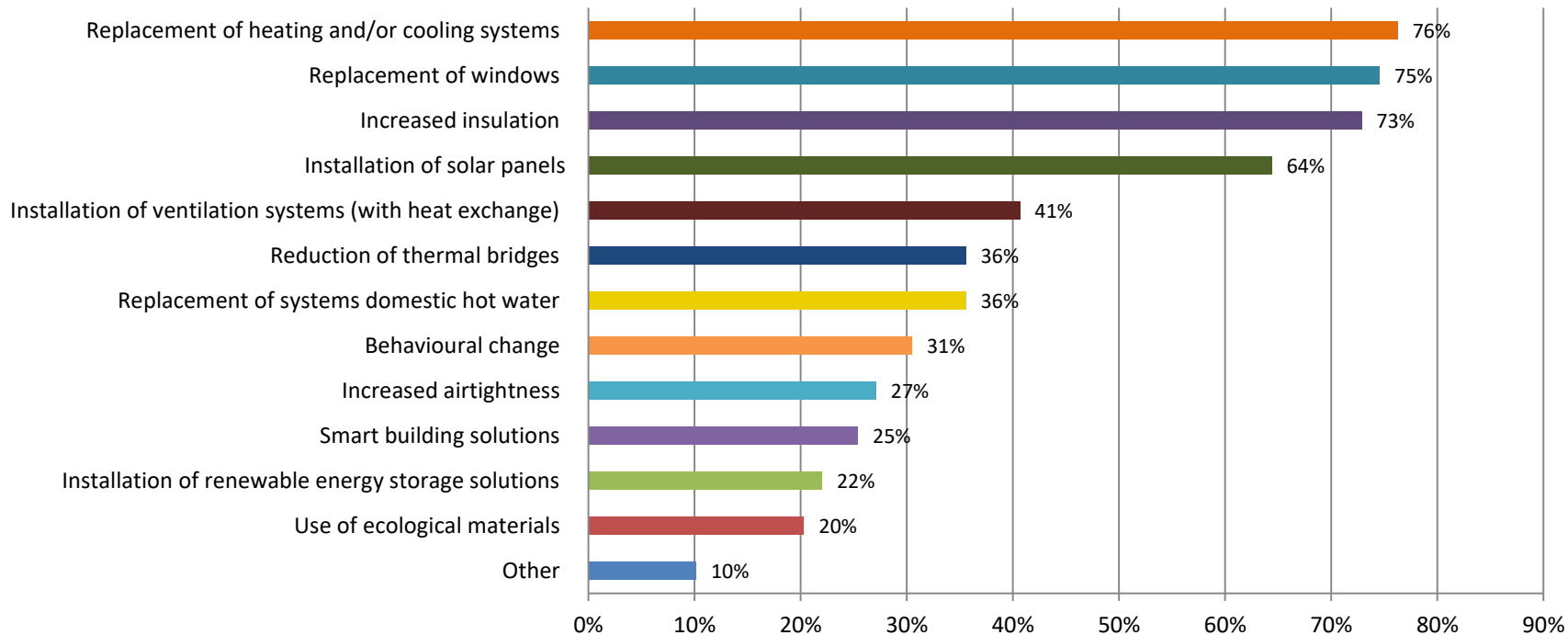- The mayor (60%) and municipal councils (55%) are most important in decision making BUT the building department should not be underestimated – rated as key by 53% of respondents. It is also likely that building departments are key in influencing the political level.
- 83% say the building department directly carries out decisions made, 64% also outsource to external architects

Focus on building departments and administrative staff as the key influencers and implementers.

Focal areas

Municipal focal areas for the built environment

Focal area	Percentage
Replacement of heating and/or cooling systems	76%
Replacement of windows	75%
Increased insulation	73%
Installation of solar panels	64%
Installation of ventilation systems (with heat exchange)	41%
Reduction of thermal bridges	36%
Replacement of systems domestic hot water	36%
Behavioural change	31%
Increased airtightness	27%
Smart building solutions	25%
Installation of renewable energy storage solutions	22%
Use of ecological materials	20%
Other	10%

Familiarity with solutions and approaches

	Passive House	EnerPHit	Pre-fab elements for new builds	Pre-fab elements for retrofits	One stop shops
used widely locally	10%	10%	9%	4%	2%
piloted locally	37%	14%	12%	7%	2%
in planning locally	10%	7%	14%	11%	7%
I have heard of it	42%	54%	60%	63%	27%
never heard of it	0%	15%	5%	16%	62%

Focal areas and solutions

- Replacement of windows, increased insulation and increased insulation (76, 75, 73%) were the most popular areas on which to focus followed by solar panels (64%)
- Ventilation, reducing thermal bridging and airtightness (41, 36, 27%), while important, were less of a focus.

- Only 10% said Passive House and/or EnerPHit was broadly being used; 62% have never heard of one stop shops.

It may be good to drive home the importance of Passive House principles in general and focus on low-hanging fruit.

Challenges

Main municipal challenges to improving energy efficiency

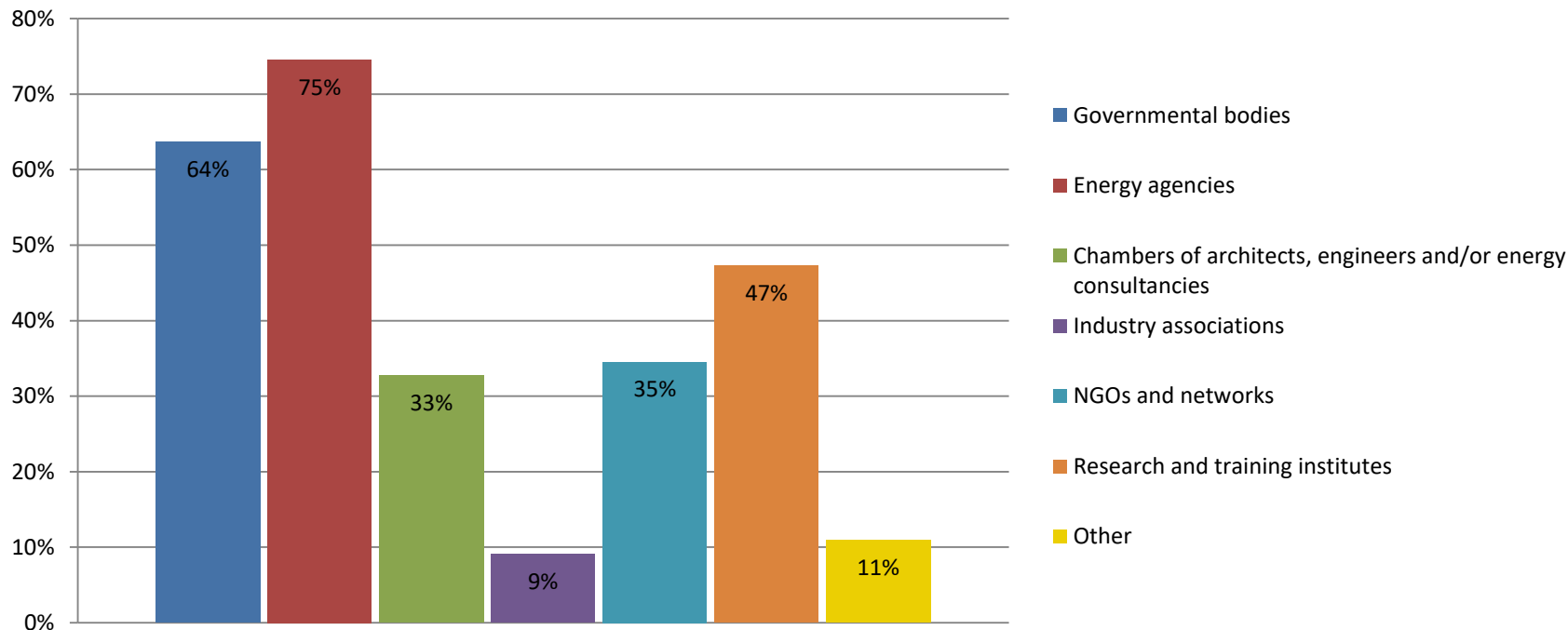| Challenge	Percentage
Conflicting objectives (total)	42%
Administrative structures within the municipality (total)	44%
Insufficient funding (total)	48%
Technical expertise of municipal staff (total)	37%
Number of municipal staff (total)	39%
Technical expertise of craftspeople (total)	13%
Too many different building types (total)	16%
Historical buildings or ensemble protection (total)	24%
Adequate contractors (total)	13%
Quality assurance (total)	9%
Outdated building laws or directives (total)	9%

Type of exchange desired

	peer to peer exchange	online exchange	in person exchange	best practice examples	training	access to experts and consultancy	access to informational materials	information on tools
Extremely beneficial	42%	15%	38%	32%	45%	57%	25%	41%
Very beneficial	31%	22%	35%	36%	20%	25%	30%	32%
Beneficial	22%	38%	24%	29%	29%	16%	36%	18%
Less beneficial	4%	7%	4%	36%	4%	2%	7%	9%
Not very beneficial	2%	0%	0%	0%	2%	0%	2%	0%

Challenges

- Conflicting objectives, administrative structures, funding and staffing are main challenges facing municipalities (42, 44, 48, and 39%)
- Coming in at a close 5th place is the technical expertise of municipal staff (37%)

- Access to experts and consultancy (57%), training (45%) and peer to peer exchange (42%) and information on tools (41%) are seen as extremely beneficial.
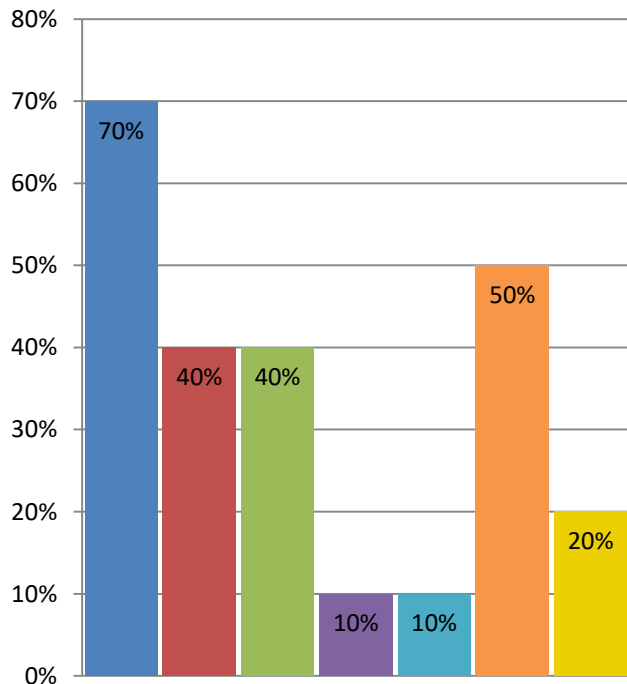- In person exchange is somewhat preferred.

outPHit can provide missing expertise and should focus on doing so. This ties in with responses on what is desired (expertise). Exchanges should be kept interactive and at least some should be in person if possible.

Information sources

Sources of information on energy consumption and supply in buildings

Legend:
- Governmental bodies
- Energy agencies
- Chambers of architects, engineers and/or energy consultancies
- Industry associations
- NGOs and networks
- Research and training institutes
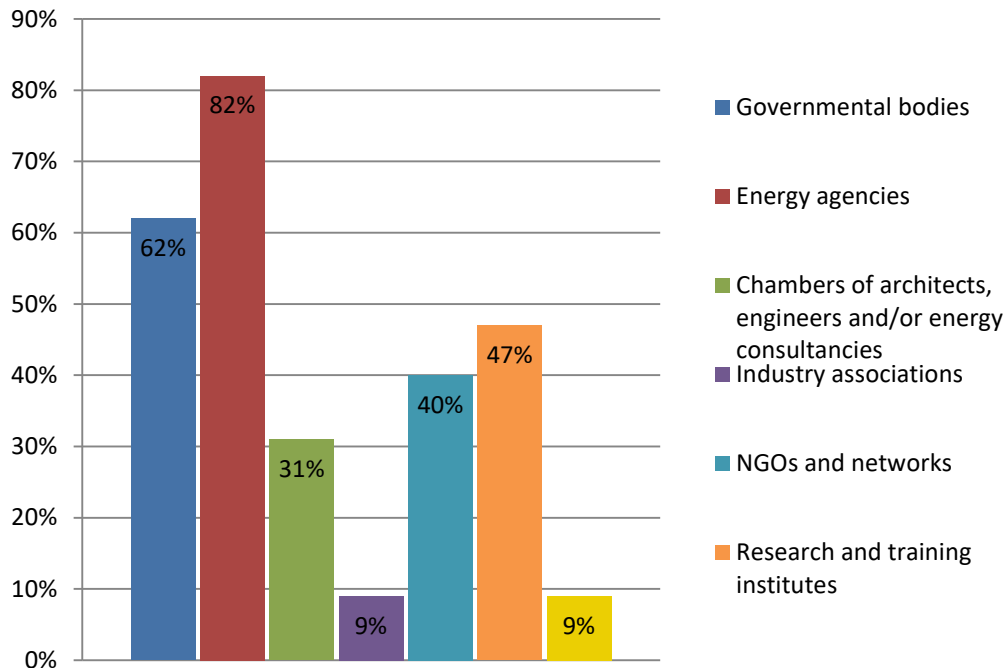- Other

Values: 64%, 75%, 33%, 9%, 35%, 47%, 11%

Information sources

Not German-Speaking

German-Speaking

Legend:
- Governmental bodies
- Energy agencies
- Chambers of architects, engineers and/or energy consultancies
- Industry associations
- NGOs and networks
- Research and training institutes

Information sources

- Governmental bodies and energy agencies come in on top at 64 and 75% respectively, followed by research and training institutes at 47%
- Of note: Energy agencies are far more important/influential in the German-speaking world

Hot topics

	Definition of goals/objectives	Scaling up to the district level	Outreach and communication	Economically viable solutions	Energy efficient retrofitting principles	Procurement of building components for retrofits	Quality assurance measures	Monitoring and calibrating energy saving technical equipment	Innovative heating/cooling technologies	Renewable energy supplies	Building automation	Utilities management	Behavioural change and awareness raising
Very relevant	56%	24%	30%	57%	45%	16%	25%	15%	33%	65%	18%	19%	61%
Relevant	28%	31%	22%	26%	29%	27%	31%	38%	36%	20%	13%	35%	19%
Somewhat relevant	11%	28%	41%	15%	24%	44%	40%	86%	18%	15%	42%	33%	19%

Hot topics

- RES (65%) and awareness raising (61%) were seen as very relevant (although, in Q8, only 33% rated comms campaigns as essential).
- Also rated as very relevant: Definition of goals (56%), economically viable solutions (57%), energy efficient retroftting priniciples (45%),

outPHit can and should provide for exchange on goals, economically viable solutions and, of course, retrofitting principles.