

Report: Evaluating the joint action Support a “Positive Energy Territory” to develop a financial instrument that could be replicated at the regional level to raise the implementation of renovation projects for private housings, Rhône-Alpes, France



Context and rationale

The implementation of this joint action comes from two statements:

- On the one hand, the difficulty from private housing owners to initiate energy efficient renovation works without guarantee on their funding ;
- On the other hand, the lack of study and experiments on efficient mechanisms able to reassure owners regarding funding works that could represent significant incentives when deciding to start energy efficient renovation works.



Description of the Joint Action

The objective of this joint action is to accompany a “Positive Energy Territory” (TEPOS Biovallée) to develop a financial instrument to raise the implementation of renovation projects for private housings. To this aim, the Regional Council of Région Rhône-Alpes launched a study using the feedbacks of a renovation program, DOREMI, implemented on the territory of Biovallée in order to define a program of refundable advances for renovation of private housing that could be replicated at the regional level. The implementation of this solution is to be performed in a second step.

How we collaborated (Description of the implementation process)

- Time frame :
 - September 2014 – set-up of the local working group: definition of needs, objectives and partners to involve
 - November 2014 : defining the technical specifications to select the subcontractor
 - December 2014 : launching the public tender and selection of the subcontractor
 - January – March 2015 : implementation of the study
 - September 2015 : dissemination of the results of the study
 - Fall-Winter 2015-2016 : implementation of the proposed mechanism
- Stakeholders involved: Regional Council of Rhône-Alpes; communities of municipalities (intercommunalities) of “Val de Drôme” and “Pays de Saillans et du Crestois” (TEPOS « Biovallée », representing more than 45 local authorities), French Agency for Environment and Energy Management (ADEME), National Agency for Housing (ANAH), the Local Energy Agency (ADIL 26), the Departmental Housing Improvement Center (CALD), the Rhône-Alpes environment, planning and housing Authority (DREAL, which is a regional service of the Ministry of Environment), local professional builders, owners of private housing, and the banking sector (Crédit Agricole Sud Rhône-Alpes).

Key results of the Collaboration

Solutions to implement a mechanism of refundable advances of funds to finance renovation of individual houses.



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Barriers and proposed solutions

- The success of the action is strongly linked to the implication of persons who initiated the LWG. Indeed, changes in the team participating in the action can cause significant delay. Consequently, it would be important to guarantee the continuation of the action despite of changes in human resources.
- Seeking innovative and operational solutions implies to associate stakeholders from all the levels of public action.

Resources (Staff required or funding)

For the first phase, dedicated to the definition of objectives and needs and the realisation the study the following staff was needed:

- a project leader, technical expert for energy efficient renovation on the TEPOS Biovallée territory (5 days)
- COOPENERGY project leader (11 days)
- Regional council project leader expert of energy efficient renovation (5 days)
- An external consultant to perform the study (12 days)

Perspectives, continuation of the action

It is planned to continue the action by implementing necessary conditions in order that the outlined solution would be actually implemented :

- Biovallée is currently preparing a mechanism of local refundable loans on its territory for the most financially humble project leaders ;
- Biovallée also planned to implement a partnership with banks in order to propose an « all in one » loans offer for energy savings cumulating grant advances, 0% loans and traditional loans for housings with debt capacities.
- Based on the results of this study that completed other works lead by the regional council, initiatives have been set-up to build at the regional level a resource and support center for renovation of housing such as DOREMI in Biovallée.
- Those platforms are progressively meshing the regional territory. They bring technical, administrative and financial support to energy efficient renovation project leaders.
- Thus, recommendations highlighted by this study could be replicated in other territories in Rhône-Alpes, by relying on these platforms and thanks to the intervention of support and resources centers with financial skills.
- In parallel, the Regional Council will also use the results during working groups. It will implement them during fall 2015 with financial institutions to favor the implementation of a financial offer considering the specificities of energy investments.

Transferability - the success factors for collaboration

- **Several meetings of the SC allow a clear definition of the needs and the means to be mobilized.**
- **Physical meetings with several stakeholders including private stakeholders (ex. Banks) coming from different territory levels are necessary.**
- **Immediate feedbacks from stakeholders will help to design relevant public policies solutions for renovation project leaders.**
- **Capitalization from previous experiences is key: on the one hand, the DORéMI initiative and the TEPOS on the other hand allowed to strengthen integrated approaches and the efficiencies of the actions. Technical knowledge taken from previous projects duplicated the efficiency of the mission.**

Success factors

- To guarantee the continuation of the action despite of changes in human resources.
- To encourage the participation of different stakeholders, including private stakeholders.
- To capitalize on previous experiences such as DORéMI and TEPOS
- To ensure the relevance of the selected subcontractor to lead the study

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