

## 4.1.1 Consulting Training Concept

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# Approach of the Consulting Training Concept

## Aim of the Consulting Training Concept

The concept has to be developed as a modularized system. It is jointly designed for documentation to be learned and benchmarking made transparent. This training concept also supports to transfer the EPO consulting service into a self-sustaining business based on national/regional funding.

## Target group

Main target group: EPOurban manager, consultants (planners, architects, real estate developer etc.)

Secondary target groups: municipalities and related departments & vocational training institutes / academic institutes

## Tasks of the training

Within the training session in the first modul the people who have to be instructed should get acquaint with the problems they have to deal with based on examples from the seven pilot areas:

Modul 1: Needed consulting service - thematic main focus per pilot area

- Leipzig
- Sopot
- Voitsberg
- Bozen
- Praha
- Celje
- Bratislava

The focus of modul 2 covers the description/overview of the procedure of the consulting system:

### Modul 2: Consulting procedure

- selection of the properties
- interaction EPOurban manager - consultants
- interaction consultants- property owner/manager
- handling of the documents
- documentation of the results

Involved parties

Modul 3 has the focus on the documents which have to be used.

### Modul 3: Presentation and discussion of the documents

- Pilot Consultation Action plan
- Consultation follow-up
- End beneficiaries evaluation
- Consulting report

## **Modul 1 – Needed consulting service - thematic main focus per PP**

There is a general need for consulting services which are connected with reconstruction and renovation of private houses. In this group mostly experts from field of civil engineering and architecture are needed. Also experts on energy conservation and optimization are necessary. Then there is need for conservators and heritage specialists in relation to historic urban structure and houses on a monument list. General requirement is on experts in building and market economics who are able to prepare cost-benefit analysis and business plan.

Experts on mediation and communication between stakeholders are also needed since it is necessary to improve also soft skills of stakeholders in relation to effective solving of conflicts.

General scheme of need of consulting services related to problems in the areas:

<b>Project partner</b>	<b>Main problems in the area</b>	<b>Needed consulting services</b>
Bolzano	Retrofit	energy conservation, cost-benefit analysis
Celje	Reconstruction, heritage conservation	architectural conservation, cost –benefit analysis
Sopot	reconstruction, heritage conservation	architectural conservation, cost-benefit analysis
Leipzig	renovation, reconstruction	cost-benefit analysis, housing market, civil engineering, architecture
Voitsberg	renovation, reconstruction	cost-benefit analysis, housing market, civil engineering, architecture
Prague	Renovation, revitalization of surrounding of houses	civil engineering, architecture, mediation between stakeholders
Bratislava	Renovation, revitalization of surrounding of houses	civil engineering, architecture, mediation between stakeholders

As an example following table gives an overview of the identified problems in Leipzig:

Area	Identified problems
<b>Leipzig</b>	<p>Specific features and problems related to the target area:</p> <ul style="list-style-type: none"> <li>• High rate of empty flats or complete buildings as well as partially or un-renovated flats and buildings</li> <li>• High amount of traffic noise/vibrations and air pollution through dust and exhausts, because of missing green areas or trees</li> <li>• Social segregation tendencies in households - mostly with low income because of unemployment or low pensions</li> <li>• Private residential owners are in lack of the amount of money which is needed for the necessary investments, most of the owners have a no bankable financial situation and have still lack of knowledge what are the future demands of the housing market or where are the chances</li> <li>• Private residential owners have interest in investments or are also willing to sell their buildings</li> <li>• some private residential owners are very hard to identify and to stay in contact</li> <li>• some public space got investments by the municipality – high costs</li> <li>• Constant Rising prices of heating and electric power cost for tenants esp. in non-renovated buildings</li> <li>• Improvement of private and public investments in target areas is still necessary.</li> </ul>

As an example the list of needed consultancy services in Leipzig covers:

- finances, business plans
- subsidy/ funds possibilities
- renovation
- housing market
- using concepts & moderation between owner and users/tenants
- law (e.g. tenancy law)

### Quality benchmarks (i.e. criteria) for consulting

Definiton of quality standards for consulting:

- Slightly different understanding of the consulting process among the project partners
- Problems related to pilot cases in each city are various and therefore may be difficult to compare among the project partners
- Consultancy system should have common background for all partners with focused on quality control

The following table gives an example for quality criteria which were defined for one pilot area:

<b>1. Common benchmarks for consultancy</b>	<b>2. Important/not important</b>	<b>3. Specification of general benchmarks for consultancy</b>	<b>4. Comments</b>
1. Achieved education level	Important		
2. License by relevant authority	Important	Authorized architect, authorized civil engineer	Member of a chamber
3. Minimum of practice in the required field	Important	Work experience	At least 3 years
4. Previous experience in similar consultancy services provided to private clients	Important	Reference projects	
5. Experience on multidisciplinary projects	Not important		
6. List of references	Not important		
7. Communication skills	Important		
8. Foreign language abilities	Important/not important		Important for EPOurban project/not important for local consulting

## Modul 2 – Consulting procedure

### *Consulting system*

The consulting procedure is slightly different among the involved project partners. It is mostly because of different set of problems and different context depend on local specifics. The consulting procedure is varying mostly in details and order of steps, e.g

- having most general scheme of consulting procedure which is enabling higher degree of flexibility, or
- having more specific and detailed scheme of the consultancy system which is caused by some specific requirements.

Such consultancy systems are working more with particular steps characteristic to local aims.

The designed and tested consulting system has to be transferable to other cities and sites with similar or related problems of urban restructuring processes. The system is enough flexible to be able to adapt on local conditions and needs which was shown and tested during the project implementation - seven regional adaptations. All seven partner cities are having more or less different social, economic and legal context in which the consulting system is functioning.

The implementation of the consulting system covers generally the following steps:

1. Identification of the target location
2. Identification of problems from the side of private owners and municipality
3. Common meetings with private owners, municipal representatives, mediator (team) (possible solutions, expert's needs, financial sources, timetable, etc.)
4. Identification of experts/consultants
5. Individual meetings between private owners, consultants and mediator (team)
6. Project planning and preparation
7. Realization of specific actions

## 8. Monitoring and Evaluation

Because of the different situations in the seven pilot areas there are minor regional adaptations of the consulting system reflecting specific problems and needs.

The following example shows the situation in Sopot (PI):

<p><b>Sopot</b></p>	<p>Consulting procedure:</p> <ol style="list-style-type: none"> <li>1. Meeting of stakeholders with presentation of consulting offer and examination of problems and needs of private owners and administrators of the buildings.</li> <li>2. Preparation of a program of conservation work by an external conservator with support of local heritage office.</li> <li>3. Acceptance of the conservation works plan by local heritage care office.</li> <li>4. Consultations with heritage care authorities and other external experts (environmental protection, technical and financial experts).</li> <li>5. Preparation of an architectural design project.</li> <li>6. Applying for necessary permits (heritage care, building permit).</li> <li>7. Applying for financial support from municipal grants.</li> <li>8. Execution of the conservation works.</li> <li>9. Reporting of the executed conservation works in order to receive reimbursement of investment from municipal grants.</li> </ol>
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### *Consulting team*

The consulting team consists of the Project staff (EPOurban team) and external consultants/experts (consulting pool) selected in tenders (in some cases each of the potential consultants was asked to fill a pre-test testing qualifications (education, experience, language capabilities, etc.)).

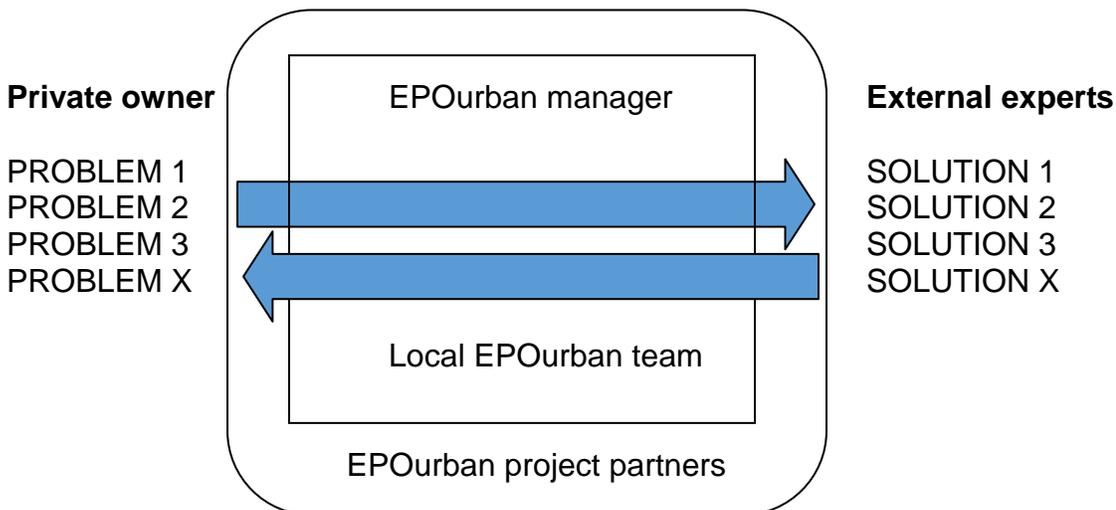
A final short list contained several experts, out of whom a “task force” of consultants has been selected (the best experts of profiles described in the announcement: technicians, legal experts, financial experts, polymaths etc.)

## Consulting Training Concept

Each external expert has been selected based on the needs predefined by the owners; consequently, he or she arranges a meeting with the owners aimed at observing the terrain or the real estate or discussing the issue raised.

There is in a global need for common consultation services among all project partners which are related to economics and technical background of urban restructuring processes. There is also common need for mediation between stakeholders. Consulting services in energy conservation seems to be growing on importance in close future therefore this should be also point of interest for all partners.

### *Communication within the consultancy system*



#### Interaction EPOurban manager – consultants

- procurement process (according to the national rules)
- contract with consultants (fixed for each pilot case)
- monitoring consultancy process
- peer review

#### Interaction consultants- property owner/manager

- design of solution for the owner made by consultants
- documenting needs (process, progress, outputs)
- evaluation consultancy

### *Quality assurance of the consulting system*

The quality assurance of the consulting system differentiates three levels:

- by the owner (evaluation sheet)
- by the manager (personal observation of the consultancy process)
- by the local partners (discussions and meetings of partners and the manager).

The mandatory use of 'EPOurban' documentation to develop the services is the basic condition (templates, work flow, standardized consultancy process structure).

The consulting activities should be performed by 'EPOurban experts' (i.e. trained consultants following the EPOurban approach).

Mandatory respect of the legal framework has to be a prerequisite for the services (technical regulations, condominium laws, etc.).

An on-going evaluation (e.g. on an annual base) based on results of the customers' satisfaction questionnaires has to be used to improve the system permanently.

## **Modul 3 – Presentation and discussion of the process documents**

The process documentation includes several documents to fill in these documents there is a flexibility according the local problems and needs.

The set of documents includes (see also annexes) the forms:

- Pilot Consultation
  - action plan
  - partner specific data entry form
- Consultation follow-up
- End beneficiaries evaluation
- Consulting report

A complete set of these documents see annexes.

### **1. *Pilot consultation***

The main form is the “Action plan” – the following table shows the first page

### **Pilot Consultation**

#### **Action plan**

<b>1. Identification of the property</b>	
Address of the property	
Owner of the property	
Property manager, contact address, phone number	
Property number and plot area	

Picture property	Picture including surroundings

2. Basic data	
Date of built	
Actual function	
Feature of the situation	<ul style="list-style-type: none"> <li>_ Centre of the city</li> <li>_ Pedestrian area</li> <li>_ close to important facility - .....</li> </ul>
Technical data (number of floors, built-up area, vacancy areas, etc.)	

The form includes following information:

1. Identification of the property (incl. pictures)
  - Address of the property
  - Owner of the property
  - Property manager, contact address, phone number
  - Property number and plot area
  - Picture property and picture including surroundings

2. Basic information

Date of built

Date of built

Feature of the situation

- \_ Centre of the city
- \_ Pedestrian area
- \_ close to important facility
- \_ .....

Technical data (number of floors, built-up area, vacancy areas, etc.)

Description of the property (construction technique, damages, extension possibilities, barrier-free, thermo-technical standard / energy certification etc.)

Main focus / problem of the property

Form of ownership of the building (private, municipal, state, cooperative, other

Structure of residents (owners, tenants, mixed, other)

Number of owners involved in the pilot case

Number of consultants involved in the pilot case

.....

### 3. Higher-ranking specifications

Land use plan

Zoning plan

Protection of the townscape

Monument protection

Annoyances by floods, noise etc.

.....

### 4. Scope of consultations

Idea for the building

Idea for the building

- \_ construction of the building
- \_ conservation of heritage details
- \_ thermic
- \_ heating system
- \_ electrical installation
- \_ other measures (windows, floors, etc.) .....
- \_ wall drainage
- \_ barrier-free measures
- \_ .....
- \_ .....

Modification of the building

Change in use of the building

Plan of concept and description  
Abandonment and new construction

....  
....

5. Chronological sequence of the consultations

Result of the 1<sup>st</sup> meeting/session  
Result of the 2<sup>nd</sup> meeting/session  
Result of the 3<sup>rd</sup> meeting/session  
Result of the 4<sup>th</sup> meeting/session

....  
.....

6. List of actions

– .....  
– .....  
– .....  
– .....

7. Time scheduling

Detailed planning period  
Period for implementation  
Period of refinancing

8. Pre-investment plan

9. Cost-benefit calculation

Cost estimation  
Calculation reduction of costs and extension of revenues  
Calculation of earning power  
Description of benefits (if no cost/benefit calculation)

10. Prediction of return on investment

11. Plan of financing

include especially

- availability of external funding (yes, no).
- percentage of external funding

source of external funding (private, municipal, state, EU funding, other).

### 12. Final report for the property owner

#### **Summary** (Summary has to be in English!)

Status consultations (summary of the meetings/sessions)

Overview planned actions

Overview time scheduling

Pre-investments

Summary cost-/ financing plan

#### **Annexes / Partner specific data entry form**

or including specific data acquisition

#### **Calculation sheet ROI**

#### **Documentation of the meetings/sessions**

\_ Building reconstruction

\_ Energetic reconstruction

\_ Utilization concept

\_ Funding

\_ .....

\_ .....

## 2. *Consultation follow-up*

1. Identification of the property

2. Comparison / calibration between reality and action plan

Serial number	Measures / actions– result of the consultation	Time line mm/yyyy	Fulfilled yes / no	Comments
1				

3. Further activities to fulfil the action plan

Serial number	Measures / actions	Time line		
		short-term	medium term	long term

4. Further need of consultancy

Date of next check of fulfilment of action list (mm/yyyy): \_\_\_/\_\_\_\_

## 3. *Evaluation sheet*

Has to be done by the owner / manager of the property:

**1. Basic information about the property**

**2. Quality assessment of the complete consultation process**

Rating system:      -2 (very poor)      -1 (poor)      1 (good)      2 (very good)

Attributs:            Complete process  
                          Assistance during the process  
                          Time flow of the process  
                          Quality of consultation (in general)

Practicability of the results  
Quality of documentation

### 3. Quality assessment of the consultation:

Rating system:      -2 (very poor)      -1 (poor)      1 (good)      2 (very good)

To rate:              EPOurban manager  
                            Consultants  
                            Consultan

Attributs:            Overall impression of the consultation  
                            Level of competence and expert knowledge  
                            Level clarity and comprehensibility  
                            Openness to special characteristics of the property  
                            (e.g. district)

### 4. Advices / Hints for a prospective consulting system

#### 4. *Consultation report*

The consultation report represents a sum up of 3 former forms:

Action plan  
Follow-up  
Evaluation sheet

and has also to include

1(short) report with 1 picture per case  
lessons learnt (per partner)  
recommendations  
added value

The description consists of (see action plan):

1. Identification of the property
2. Basic information
3. Scope of consultations
4. Summary of the consultation appointments
5. Summary pre-investment plan
6. Cost-benefit calculation
7. Prediction of return on investment

8. Plan of financing  
and additional information about

9. Experiences

Lessons learnt

Added value

Recommendations for similar cases

- barriers concerning funding/financing
- usage concepts for houses (at large streets)
- handling of vacancy
- complex ownership structures
- poor technical condition
- energetic reconstruction
- building reconstruction
- .....

Annexes consists of:

Action plan

Follow-up

Evaluation sheet

Partner specific data entry form

### Annexes

#### Process documents

- Pilot Consultation
  - action plan
  - partner specific data entry form
- Consultation follow-up
- End beneficiaries evaluation
- Consulting report

#### Example – Consulting report

**Process documents**

**Pilot Consultation**

**Action plan**

<b>1. Identification of the property</b>	
Address of the property	
Owner of the property	
Property manager, contact address, phone number	
Property number and plot area	
<b>Picture property</b>	<b>Picture including surroundings</b>

<b>2. Basic data</b>	
Date of built	
Actual function	
Feature of the situation	<input type="checkbox"/> Centre of the city <input type="checkbox"/> Pedestrian area <input type="checkbox"/> close to important facility - .....

Technical data (number of floors, built-up area, vacancy areas, etc.)	
Description of the property (construction technique, damages, extension possibilities, barrier- free, thermo- technical standard / energy certification etc.)	
Main focus / problem of the property	
Form of ownership of the building (private, municipal, state, cooperative, other)	
Structure of residents (owners, tenants, mixed, other)	
Number of owners involved in the pilot case.	
Number of consultants involved in the pilot case	
...	

<b>3. Higher-ranking specifications</b>	
Land use plan	
Zoning plan	
Protection of the townscape	
Monument protection	
Annoyances by floods, noise etc.	
...	

<b>4. Scope of consultations</b>	
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Idea for the building	
Rehabilitation measures	<ul style="list-style-type: none"> <li>_ construction of the building</li> <li>_ conservation of heritage details</li> <li>_ thermic</li> <li>_ heating system</li> <li>_ electrical installation</li> <li>_ other measures (windows, floors, etc.) .....</li> <li>_ wall drainage</li> <li>_ barrier-free measures</li> <li>_ .....</li> <li>_ .....</li> </ul>
Modification of the building	
Change in use of the building	
Plan of concept and description	
Abandonment and new construction	
....	
....	

<b>5. Chronological sequence of the consultations</b>	
Result of the 1 <sup>st</sup> meeting/session	
Result of the 2 <sup>nd</sup> meeting/session	
Result of the 3 <sup>rd</sup> meeting/session	
Result of the 4 <sup>th</sup> meeting/session	
....	
....	

<b>6. List of actions</b>	<ul style="list-style-type: none"> <li>_ .....</li> <li>_ .....</li> <li>_ .....</li> <li>_ .....</li> </ul>
....	

<b>7. Time scheduling</b>	
Detailed planning period	
Period for implementation	
Period of refinancing	

<b>8. Pre-investment plan</b>	

<b>9. Cost / benefit calculation</b>	
Cost estimation	
Calculation reduction of costs and extension of revenues	Date: Topic:
Calculation of earning power	Date: Topic:
Description of benefits (if no cost/benefit calculation)	

<b>10. Prediction of return on investment</b>	Date: Topic:

<b>11. Plan of financing</b>	
include especially <ul style="list-style-type: none"> <li>• availability of external funding (yes, no).</li> <li>• percentage of</li> </ul>	Date: Topic:

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external funding <ul style="list-style-type: none"> <li>source of external funding (private, municipal, state, EU funding, other).</li> </ul>	
...	

<b>12. Final report for the property owner</b>	

**Annexes/ Partner specific data entry form**

**Calculation sheet ROI**

**Documentation of the meetings/sessions**

- \_ Building reconstruction
- \_ Energetic reconstruction
- \_ Utilization concept
- \_ Funding
- \_ .....
- \_ .....

## Consultation follow-up

<b>1. Identification of the property</b>	
Address of the property	
Owner of the property	
Property manager, contact address, phone number	
Property number and plot area	

<b>2. Comparison / calibration between reality and action plan:</b>				
Serial number	Measures / actions– result of the consultation	Time line mm/yyyy	Fulfilled yes / no	Comments
1				
2				
3				
4				
n				

<b>3. Further activities to fulfil the action plan:</b>		
<b>Serial number</b>	<b>Measures / actions</b>	<b>Time line short-term medium term long term</b>
1		
2		
3		
4		
n		

<b>4. Further need of consultancy:</b>	
Architect	
Structural engineer	
Energy management	
Financing expert	
...	
....	

**Date of next check of fulfilment of action list (mm/yyyy):**  /  /

**Evaluation sheet**

1. Basic information about the property	
Address of the property	
Owner of the property	
Property manager	
EPOurban manager	
Appointed expert consultant / Consulting team	

**2. Quality assessment of the complete consultation process:**

Has to be filled in by the owner / manager of the property

Rating the following **attributes of the whole consultation** process by using the rating system:

**-2 (very poor)    -1 (poor)    1 (good)    2 (very good)** – insert a figure

Attributes	Figure
Complete process	
Assistance during the process	
Time flow of the process	
Quality of consultation (in general)	
Practicability of the results	
Quality of documentation	

**3. Quality assessment of the consultation:**

Has to be filled in by the owner / manager of the property

Rating the following **attributes of your consultants** by using the rating system:

**-2 (very poor)      -1 (poor)      1 (good)      2 (very good)** – insert a figure

	Overall impression of the consultation	Level of competence and expert knowledge	Level clarity and comprehensibility	Openness to special characteristics of the property (e.g. district)
<b>EPOurban manager</b>				
<b>Consultant:</b>				
<b>Consultant:</b>				
<b>Consultant:</b>				
<b>Quality of documentation</b>				

**4. Advices / Hints for a prospective consulting system:**

Would you like to **use the started consultation in the future** depending to specific topics?

Yes, about the topic .....

No

How much is **the received consultation** worth for you, including the received documents?

from .....€                      to ..... €

or description of the worth: .....

Would you **recommend the received consultation** to other private residential owners?

Yes,

no,

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because .....

In your opinion, are there any **needs of improvement** for the consultation system of EPOurban

Yes, ..... no, .....  
because .....

Date: .....

Signature: .....

Contact:

**Consultation report**

<b>1. Identification of the property</b>	
Address of the property	
Owner of the property	
Property manager, contact address, phone number	

<b>2. Basic information</b>	
Actual function	
Technical data (number of floors, built-up area, vacancy areas, etc.)	
Short description of the property (construction technique, damages, extension possibilities, barrier-free etc.)	

<b>3. Specific consultations</b>	
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<b>4. Summary of the consultation meetings/sessions</b>	
Number of appointments	
Summary of the consultation meetings/sessions	

<b>5. Summary pre-investment plan</b>	
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<b>6. Cost / benefit calculation</b>	
Description of benefits (if no cost/benefit calculation)	
<b>7. Prediction of return on investment</b>	Date: Topic:
<b>8. Plan of financing</b>	Date: Topic:

<b>9. Experiences</b>	
Lessons learnt	
Added value	
Recommendations for similar cases - barriers concerning funding/financing - usage concepts for houses (at large streets) - handling of vacancy - complex ownership structures - poor technical condition - energetic reconstruction - building reconstruction - .....	

## **Annexes**

**Action plan**

**Follow-up**

**Evaluation sheet**

### **Partner specific data entry form**

\_ Building reconstruction

\_ Energetic reconstruction

\_ Utilization concept

\_ Funding

\_ .....

\_ .....

**Calculation sheet ROI**

## Example - Consultation report

<b>1. Identification of the property</b>	XXXXXX
Address of the property	XXXXXX
Owner of the property	Multi-property
Property manager, contact address, phone number	XXXXXX
Property number and plot area	XXXX

<b>2. Basic information</b>	
Actual function	Residential
Technical data (number of floors, built-up area, vacancy areas, etc.)	5 floors 2000 ms total floor area 7100 mc
Short description of the property (construction technique, damages, extension possibilities, barrier-free etc.)	brick walls (30 cm) wood windows (1976) centralised heating system

<b>3. Specific consultations</b>	<ul style="list-style-type: none"> <li>_ thermic</li> <li>_ heating system</li> <li>_ electrical installation</li> <li>_ other measures (windows, floors, etc.) .....</li> <li>_ barrier-free measures</li> </ul>
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<b>4. Summary of the consultation meetings/sessions</b>	
Number of appointments	2
Summary of the consultation meetings/sessions	Agreement on the Participation to EPOurban and Discussion of Consultation Report

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<b>5. Summary pre-investment plan</b>	See Estimated Cost
<b>6. Cost / benefit calculation</b>	

	<i>Benefit Description</i>	<i>Estimated Building Energy Performance Class</i>	<i>Estimated Cost [euro]</i>
EXISTING SITUATION	-	F (168 kWh/m <sup>2</sup> y)	-
PROJECT PROPOSAL 1	new heating system + solar panels	F (168 kWh/m <sup>2</sup> y)	200.999
PROJECT PROPOSAL 2	new heating system + solar panels + envelope insulation (and windows)	B (45 kWh/ m <sup>2</sup> y)	1.074.757
PROJECT PROPOSAL 3	new heating system + solar panels + envelope insulation (and windows) + centralised mechanical ventilation	A (26 kWh/ m <sup>2</sup> y)	1.340.389

<b>7. Prediction of return on investment</b>	
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	<i>Estimated Cost [euro]</i>	<i>Estimated PayBack Period</i>
PROJECT PROPOSAL 1	200999	7

PROJECT PROPOSAL 2	1074757	15
PROJECT PROPOSAL 3	1340389	21

<b>8. Plan of financing</b>	Topic: use of fiscal and economic incentives from State and Province. 50%, 55% and 65% of tax deduction from the State for energy retrofitting measures and 30% of economic incentives from the Province for specific technologies and measures.
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<b>9. Experiences</b>	
Lessons learnt	Building located in residential area in the south of the city of Bolzano, built in the 1970s, does not suffer from technical barriers concerning the insulation of façades, the renovation of windows and the location of technical plants. No possibilities for extension due to existing urban constraints. The combination of
Added value	High quality of urban area and steady building property value, despite the real estate crisis. Energy retrofit can increase (or maintain) property value.
Recommendations for similar cases - barriers concerning funding/financing - usage concepts for houses (at large streets) - handling of vacancy - complex ownership structures - poor technical condition - energetic reconstruction - building reconstruction - .....	Main barrier: urban constraints due to urban plan

## **Annexes**

**Action plan**

**Follow-up**

**Evaluation sheet**

**Partner specific data entry form**