



# D3.4 Installer Database and Rating System

RenoHUB H2020 project

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# PROJECT PARTNERS

AACM: AACM Central Europe Llc

ENERGIACLUB: Energiaklub Climate Policy Institute and Applied Communications Association

IMRO: IMRO-DDKK Non-profit Ltd

MCSTE: Hungarian Family House Owner Organization

MEHI: Hungarian Institute for Energy Efficiency

# 1. INTRODUCTION – AIM OF RENOHUB PROJECT

RenoHUB is a non-profit, market-neutral support organization and not a new, competitive market player. It aims to provide a wide range of assistance to homeowners in order to tangibly improve the energy efficiency performance of residential buildings and to establish closer, more transparent relationships between stakeholders in the residential energy renovation market in order to achieve this.

RenoHUB implements a one-stop-shop model, which is already a successful and proven tool in many European countries to effectively support property owners and condominium managers at all stages of the energy renovation of their buildings. The services of the system cover the full spectrum of the reconstruction and modernization process without gaps: from the social situation, behavioural, communication, education and training aspects to decision-making, technical, legal and financial implementation support to the ex-post evaluation of energy and cost savings.

Renovation of family houses and condominiums and the substantiation of energy efficiency modernization with professional and statistical data should continue even after the results of previous preliminary surveys and subsequent support programs. RenoHUB intends to provide transparent support to two target groups, typically in different sociological, social and legal situations (family homeowners and condominium managers, operators), operating in a market environment during the preparation, implementation and operation phases.

When it comes to renovation, family home owners and condominium managers have different motivations and drivers, levels of information and standardization, often technical solutions, unit prices, and rating (creditworthiness). In addition to these the conversion of detached houses for energy purposes also requires deeper planning and management knowledge.

The comprehensive refurbishment of the residential building stock clearly goes far beyond the professional insight found in public thinking, so building professional relationships and recognizing and using professions in the whole process in a timely and reliable manner is at least as

important as knowledge of financial constructions, which requires a complete change of approach during the preparation, implementation and after acquisition during the operation period of residential energy efficiency investments. and.

During the elaboration of the RenoHUb model, it became certain that the support of the green transition and energy efficiency in the Hungarian residential sector is only possible through the relationship management of the offline office system and the coordinated and complementary methods of online communication and platforms.

Due to the effect of our joint efforts, we established the service called “RenoPoint Energy and Home Renovation Center” which is the part of RenoHUb structure consisting of an Online Platform and an Information Office Network. The available project resources cover the set-up and full operation of the Online Platform, the operating costs of the two pilot Information Offices set up to demonstrate the completeness of the system in Budapest and Nagykanizsa, followed by the establishment of a nationwide office network.

The project is committed to providing technical, legal and financial knowledge to end users in a way that recognizes their own interests in energy efficiency and modernization. As a result, the indicators of domestic energy dependence and energy poverty will improve and the level of emissions from the residential building sector will be closer to the expectations of Hungary and the European Union.

## 2. FUNCTIONING OF RENOPOINT SERVICE AND ONLINE PLATFORM

RenoPoint is the first non-profit one-stop office network and online platform for the quantitative and qualitative development of energy renovations in Hungary.

By creating an online platform and office network, we help ensure that their renovation needs lead to the right, yet professional, efficient and comfortable results for them. We will help you find the best value solution and add financial opportunities as well. We recommend proven, reliable

professionals and contractors to ensure they get quality for their money. On the online platform, all this is supported by an online calculator (how much could I save?), Clear information about the renovation, possible products, an opinionable expert-contractor database, and downloadable template documents. The goal is for people to live in a nicer, more comfortable, healthier, energy-efficient, eco-friendly home, with the benefit of even the climate and the domestic economy.

## 3. BACKGROUND OF CREATING A SPECIALIST DATABASE

### 3.1 Introduction of WP3

The work in this work package is based on the business model that is developed under WP2. The materialization of this conceptual design will happen in WP3, namely the establishment, testing, launch and operation of the RenoHUB Online Platform, as well as the Information Hotspots. The purpose of the combination of the Online Platform and Information Hotspots as physical offices is to maximize to project outreach without segmenting the target audience based on the proficiency in the use of internet-based solutions. Whilst the platform is anticipated to target rather the younger generation and mainly people with higher level of education who routinely use IT-based applications, the information hotspots will most likely be used by the older generations and people with less experience in the use of internet-based applications.

### 3.2 Description of Task 3.4

It is now an indisputable fact that energy-efficient renovation of buildings requires professional support.

The Hungarian construction culture typically tried to relativize proficiency in a single-family environment, which was justified by cost-effectiveness – thanks to which *kalaka* (voluntary co-operative work) construction became popular – but even in renovation of condominiums requiring more serious design and construction control, this approach could be experienced typically by the conflict between design and construction and in the absence of controls.

On this basis, how people today are demanding initiatives that support professionalism? Why would users, people about to renovate look for specialists through our project?

The aim of the present Work Package is to point out that, under market-based conditions, all working phases related to the energy-efficient renovation of buildings are a complex process and can only be the result of joint cooperation and coordination between several professional fields. As a result, we want to allow the appearance in the specialist database of all professionals who are able to contribute to the success of a complex building renovation process.

The complexity of domestic legal regulations and big number of market participants encourages those who are about to renovate to consult about the working phases implemented very rarely by them with someone, to read about these phases and to have an objective and subjective impression of the given specialist.

In our service, we can only complete the transfer of legal and technological knowledge if we also guarantee a kind of customer-centric quality assurance by recommending and monitoring the professional partners connected to our network. For this reason, one of the greatest values for the customer using RenoPoint service is to reach pre-qualified, reliable specialists, as we can eliminate a significant part of the construction risks by commissioning a professionally trained and reliable specialist.

## 4. ESTABLISHMENT OF PROFESSIONAL RELATIONS, APPEARANCE IN A DATABASE

The range of professional supporters involved in real estate renovations is very wide. In the database, we can therefore connect the professionals to the stages of the renovation process.

### 4.1 Professional groups

Professions recommended in the preparatory phase:

#### **1. Consultants**

It is typically a complex service provider or office where technical, financial (banking and other resources) and legal support are presented in a unified manner.

#### **2. Engineer, energy auditor, expert, lawyer**

It is important to recognize that detached houses and condominiums, as individual projects, also require specialists in this field, therefore these professionals and offices are also important in this professional group.

- a. Data to be displayed after registration in the database: Company name, telephone number, e-mail address and region specific to the activity (eg: Zala, Somogy)
- b. In this group, if the person interested does not get contact close to his /her settlement, a specialist from another region can be recommended, as this can be mainly professional consultations and site visits limited to one occasion, which can be handled and organized more flexibly by both parties.

### 4.2 Professionals involved in the implementation phase:

#### **1. Manufacturers, distributors**

Technologies and the built-in materials needed to implement them play a significant role in energy-efficient reconstructions. The oversupply in this area is such that it in itself justifies distinction between manufacturers and distributors within the professional group.

Structure of the differentiation of materials and technologies:

- i. Insulation technology manufacturers, distributors: the technology related to the insulation of all available cooling surfaces should be included in this segment. Their distinction is basically clarified by the areas of use (facade, ceiling, roof, etc.) or by professional supporters (engineer, energy expert) to help with the selection.
- ii. Building engineering manufacturers, distributors: the so-called primary systems (heat supply, hot water production systems) and the so-called secondary systems (heat emitters), this also includes products and technologies that reduce the losses of measurement and piping systems.
- iii. Building electricity manufacturers, distributors: electrical technologies including the building's consumer endpoints and power transmission systems, low-current, signalling and control systems.
- iv. Manufacturers and distributors of renewable energies: these systems themselves include building engineering and electrical solutions, but their main feature is that they not only replace and optimize an existing system, but also provide a new energy source for the heating, hot water and electrical systems of buildings.

Further notes:

- a) Data to be displayed after registration in the database: Company name, telephone number, e-mail address and characteristic region of the activity (eg: Zala, Somogy)
- b) In this group, if the interested party does not receive contact information close to his / her locality, a manufacturer or distributor from another region can still be recommended, as commercial and logistics chains are usually nationwide (eg: a thermal insulation material manufacturer has a national distribution network across)

#### 4.3 Constructors

The construction profession can be characterized by newer professional groups in terms of expertise and implementation. For

companies involved in construction, the depth of specialization is important, ie whether they are able to cover one or more professional groups and how much resources they have.

- i. Insulation technology
- ii. Building services, Measurement technology
- iii. Building electricity
- iv. Renewable energies

Further notes:

- b. Data to be displayed after registration in the database: Company name, telephone number, e-mail address and characteristic region of the activity (eg: Zala, Somogy)
- c. Due to the more limited special fetatures of the construction activity - as the movement of human and machine resources means more organization and additional costs - following the basic spirit of RenoHUB, it is not advisable to transport over long distances. The recommendations should therefore be made within 100-150 km, which should be agreed with the relevant construction company before the proposal.

#### 4.4 Technical supervisors

The technical inspectors guarantee the controlled implementation of the construction, thus guaranteeing a high-quality renovation.

- a) Data to be displayed after registration in the database: Company name, telephone number, e-mail address and region specific to the activity (eg: Zala, Somogy)
- b) Due to the more limited specifics of the technical inspection activity (multiple on-site visits, consultations), it is worth making the recommendations within 100-150 km, which should be agreed with the relevant technical inspection company before the proposal.

#### 4.5 Further comments

In the preparation phase, we mostly need to present through the database the professionals who will lay the foundations for the renovation. From a technical point of view, therefore, those supporting and expert engineering specialists and companies can join our project, who can add value to the renovation, get to know the technical condition of a modernization, its planning, cost planning, start and support of construction processes.

In the preparatory phase, in addition to getting to know the technical content as well as possible and estimating the possible costs, experts and consultants working in the field of law and finance can play an important role. Their work can protect users from significant risks. It can also be a mutual security for service providers.

Users encounter a really large oversupply, and due to their superficial knowledge, they have to strive for outstanding safety in the implementation and execution phase. In this phase, a controlled and monitored database can be an effective help to customers. An important part of entering the database is therefore a verifiable reference, knowledge of the methodological elements of RenoHUb and acceptance of the terms of cooperation with the offices.

The controlled implementation of the construction is served by the technical inspectors, who accompany the construction process through site visits and point out and correct any errors as experts.

## 5. PROCESS AND CONDITIONS OF INVOLVEMENT INTO THE DATABASE

The professional forums and the project's own communication should help to make joining RenoHUb attractive. The search for national and local (regional) cooperation with various professionals is therefore a particularly important part of achieving the goal of the one-stop project and effective customer management.

Presenting the RenoHUb project and offering collaboration to the profession at local and national level through media, professional

conferences and presentations is an important task. Achieving total coverage in professional groups and territorially the nationwide coverage will support the efficiency of both the database and office work.

Therefore, the structured knowledge and systematic presentation of the renovation market is attractive not only for the end users, but also for the potential market participants who see an opportunity in this segment.

Therefore, it is possible to contact both through the central contact points and the service offices. With this method, companies, manufacturers and service providers with national coverage are also included in the database, but a significant role is given to a local smaller company or, due to the profile characteristics, to companies of a regional nature (eg construction).

Contact is in any case voluntary, but due to the activity of the offices, inquiries along recommendations or good references cannot be ruled out, while retaining volunteering.

The "Be our partner!" menu is constantly available on the online interface, which we also draw attention to during personal conversations, direct mail announcements and public presentations. The condition for joining is to participate in a methodological online or offline training (made mandatory for company managers and colleagues operatively participating in the program). The acceptance of the participation in the methodological training is already formulated in the cooperation agreement, in which the basic pillars of bilateral cooperation are laid down.

Terms of cooperation:

- participation in professional-methodological training
- customer contact and communication method
- acceptance of the RenoHUB evaluation, acceptance of its publicity
- acceptance of the data content and publicity of the database
- the conditions for unilateral termination of the cooperation agreement

- conditions for deletion from the database and acceptance of deletion
- data protection

## 6. MINIMUM CONDITIONS FOR ENTRY IN THE DATABASE

In order to be included in the professional database, a professional, be it an individual or a company, must meet the following minimum conditions:

- at least 5 years of operation
- entering the basic data of the company: start of operation, areas of activity, number of employees, name of properties, registered office of the company, tax number, number of the register of companies, presentation of permits related to the activity
- Company financial data: provide key financial data for the last 5 years
- the possibility to search the public debt-free taxpayer database or to prove the public debt exemption in another credible way
- data on professional training: qualifications of the main employees, licenses, chamber membership number
- presentation of company liability insurance
- presentation of at least 5 verifiable reference works, with the name of the place, year, customer and a short text and photo presentation of the project

The submitted data and documents are checked by RenoPoint experts and in case of compliance they are entered in the database with the inscription RenoPoint verified partner.

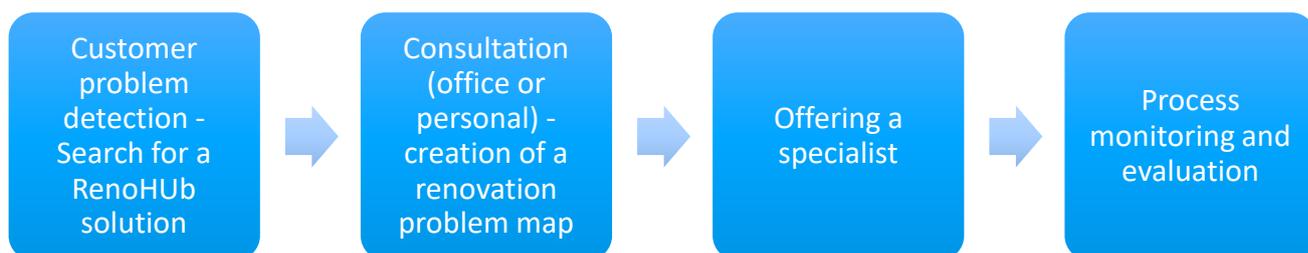
## 7. THE ROLE OF VOCATIONAL TRAINING IN COOPERATION

Our project represents a complex methodological approach to the renovation of both family houses and condominiums. Complexity presupposes the possession of skills that lead to customer satisfaction and a sense of security. These skills include how to contact, how to communicate, bidding culture, basic pillars of contracting, fulfilment and its documentation, and handling error and customer complaints. Therefore, before entering the database and making recommendations, professionals and companies must take a course describing and sensitizing the approach, and accept the methodology in the cooperation agreement as a partnership criterion.

An important part of the process is the practical implementation of the cooperation: the offices carry out a professional needs assessment task in this, and then they recommend a specialist or specialists for the phase and solution of the given problem. The recommendation will also be notified to the specialist or, if necessary, a conciliation meeting will be arranged. From this point on, it is the responsibility of the office to receive feedback directly on the progress of the process from the professional or the client.

## 8. USAGE OF THE SPECIALIST DATABASE

We made the database available primarily through the online platform in order to provide those interested with basic information that can help them move forward at any stage of the renovation process, but we also consider the supporting role of the offices to be important. Therefore, on the online interface, we link the search for specialists to the offline consultation (the database will be available only after the office consultation), thus it will be possible for an interested party to receive answers to complete and as many detailed questions as possible.



The online interface asks the client a question about the offline consultation after registration, and then, after answering it, offers to contact the specialist by providing a name, email address and phone number.

As the specialist database is also based on registration and methodological cooperation, the operators of RenoHUB can provide the customer with information and contacts for preparatory specialists or implementation.

In our view, initiating personal office meetings becomes of paramount importance, but establishing a telephone, online connection can also result a verifiable, traceable process.

The RenoHUB system reserves the right to maintain reference information about professionals in the database that is not included in the online, public database, primarily information about professionals that may help to collaborate, improve relationships, or even suggestions for corrective work.

### 8.1 Development and management of a specialist database

Connecting to the database is a continuous option for professionals, and it is the responsibility of RenoHUB operators to update and expand it.

When contacting online, it may be possible that there are no specialist, company or organization to recommend within a particular professional group. Overcoming this shortcoming is ensured by the possibility of database expansion. In this case, RenoHUB employees can contact a well-known or well-referenced specialist or company with the need for the

given profession. In addition to describing the specific customer need, the query can also be used to connect to the database.

Therefore, the employees of the offices primarily - if they have found a suitable company on the basis of professional criteria and have several options - they release the data and information of companies, or forward a renovation inquiry to the professionals and companies who decide to cooperate with RenoHUb. Based on the above, the interests of the customers and the continuity of the system are also maintained.

## 8.2 Evaluation of professionals

Regardless of the professional task group, the evaluation of any professional is performed by the client, typically electronically, but also with a paper-based document. It is possible to evaluate a specialist after using the work of a specialist, but it is not necessary for the assignment to be closed.

The purpose of the evaluation is to provide feedback to the professionals, to collect their own benchmarks in the recommendation, to initiate the examination of defective performances through the results of the evaluation, and to protect the renown of companies in the professional database.

The evaluation aspects are listed in the table below, which can be answered with a score of 1-10. By averaging the ratings that can be collected, a maximum of 10 points can be achieved, below which we establish grades (9-10 points excellent, 7-8 points good, 5-6 points acceptable).

### Aspects of evaluation:

<b>Perspectives of evaluation</b>	<b>Content of evaluation</b>
the specialist responded to my request within the time I envisioned	recommended duration is 1-3 days

the specialist's offer was worked out in sufficient detail for me	supported by a transparent and sufficiently detailed offer and itemized prices
the specialist completed the work on time within the contractual framework	the evaluation is the fulfilment of the agreed deadline
the specialist performed the work in the capacity undertaken	the evaluation is ensured by the expected quality and freedom from complaints
the technician has performed the requested warranty repairs properly within the time limit	in addition to the necessary follow-up and commissioning, to carry out the necessary fault repairs quickly and professionally
I would recommend the professional to others as well	an expression of satisfaction
the specialist arrived reliably, keeping order	assesses working conditions
the specialist was available; communicated politely, kindly; clearly articulated, answered my questions	the client evaluates the communication of the specialist from the beginning to the end of the work

Beside the grading framework, the formulation of individual and personal comments can also be made in text. The purpose of the textual evaluation is to give the clients the opportunity to express their thoughts, which could not be expressed on the scoring scale, within 300 characters, the publication of which is possible with the permission of the admin (operator).

The purpose of the database is not to provide the public with negative information about poorly performing professionals, so after the evaluation, we will contact the client and try to find out the reason for the bad evaluation, and we will inform the professionals at which point they received the evaluation. providing the possibility of correction. However, it is not advisable to publish the customer evaluation on public surfaces, because it does not serve the purpose of the project.

Feedback is important for both the client and the professional, so in addition to qualification, the evaluation also aims to increase the number of good examples implemented in the system, and also guarantees the quality assurance of the professional database.

During the feedback, in case of possible jams or other needs, new specialists can be recommended, but at the same time the evaluation of the specialist's work begins, which ends with a customer satisfaction questionnaire.

The role of evaluation is to support the work of the professionals in the database, to screen out potential problematic experts, and to exclude them from the database based on multiple and recurring negative feedback.

**RenoPoint Qualified Partner** titles are awarded to professionals who regularly handle the transactions and clients entrusted to them and have a rating of 9 or higher based on at least 15 ratings. The offices can submit a proposal for the award of this title and decide on its award in a forum set up by the project partners.

## 9. SUMMARY

Establishing collaboration with professionals is a back-and-forth process, as offices can provide tangible and proactive assistance to energy-efficient renovators to achieve their intentions with quality and ongoing professional support.

Professionals can be involved in the renovation process at different levels and stages, in which case the office can also provide the necessary flow of professional information.

The education of the profession is available through the system in the same way as raising customer awareness. First and foremost, customers may find that this is a process in the preparation phase of which it is better to get answers to all the questions and to carry out their own energy efficiency project with this knowledge. The professional circles can also develop innovative legal, financial and technical solutions through collaboration while learning about the entire picture.

In addition to a knowledge base, the work of the offices can also play the role of a professional coordinator, which also fulfils one of the important goals of the RenoHUB program: the continuity of the offices will be ensured. This is due to the need for an organization that provides comprehensive

professional knowledge and also acts as an intermediary in achieving environmental and energy efficiency goals, while ensuring professional standard and quality.