

## Task 2.3

# D2.9 « Final report on preparatory measures for the housing renovation service »





Task 2.3	Work Package No.	WP2	Task/s No.	Task 2.3
Work Package Title	Integrated home renovation service definition			
Linked Task/s Title	Collaboration with professionals and service providers			
Status	Final			
Dissemination level	Pu-Public			
Due date deliverable	31/08/2021	Submission date	28/04/2022	
Deliverable version	D2.9 « Final report on preparatory measures for the housing renovation service »			

## Contributors

Responsible	Nans MAROT		
Contributor	Organisation	Proofreading	Organisation
Nans MAROT	TM	All	All



Contributors	2
1. Background	5
2. Preamble	6
3. Commitments between Toulouse Métropole and its partners	7
<b>3.1. Sharing a common vision and ambitions</b>	<b>7</b>
<b>3.2. Contribute to the proper functioning of the scheme</b>	<b>7</b>
<b>3.3. Insure quality of service</b>	<b>8</b>
<b>3.4. Commit to the skill improvement of professionals</b>	<b>9</b>
<b>3.5. Permettre la participation de tous au développement et au maintien du dispositif</b>	<b>10</b>
4. Membership, exclusion, renewal, termination, follow-up	11



## Glossary

ABBREVIATION	DESCRIPTION
PU	Public
WP	Work Package
MI	Detached house
COPRO	Co-ownership
TM	Toulouse Metropole



## 1. Background

Toulouse Métropole is committed to the energy and ecological transition by adopting in June 2018 the Climate-Air-Territorial Energy Plan (PCAET). By 2030, Toulouse Métropole aims to reduce GHG emissions production by 40%, reduce the region's final energy consumption by 20% and double its share of renewable energy. The energy master plan adopted in 2019, which operationally declines the energy objectives of the PCAET, underlines that residential is one of the main sectors most energy-consuming and greenhouse gas source in the territory. Indeed, the territory of Toulouse Métropole has more than 427 759 dwellings, 46% of which were built before the first thermal regulation of 1974. This is why the challenge of energy renovation of buildings has been the subject of a major amplification goal with a goal of 7500 renovations per year, compared to 3000 in 2020 in metropolitan territory.

Thanks to the financial support of the Occitanie Region and the European Union, Toulouse Métropole has committed to the development of a one-stop-shop for energy renovation, which will offer a support service to households in their home renovation journey. The one-stop shop in Toulouse Métropole consists of several devices: the European project "I-HEROS" (Horizon 2020) and the Renov'Occitanie Programme. In addition, it is related to the General Interest Program (PIG) of Toulouse Métropole.

By combining these various aid schemes for energy renovation, Toulouse Métropole aims to massively renovate and improve its quality, thus stimulating the local economic fabric. For this, Toulouse Métropole wishes to involve the economic actors involved in the renovation of the building: construction companies and craftsmen, architects and project managers, design offices, consulting firms or trustees. Indeed, they are essential actors for the massification of energy renovation. That's why Toulouse Métropole wants to rely on these building professionals committed to a qualitative approach by proposing measures optimising their interventions and promoting their skills improvement.

## 2. Preamble

To better identify the needs and expectations of professionals, this charter was developed with the partners of the I-HEROS project (Solagro, ADIL, Agence Parisienne du Climat, GRDF, Caisse des Dépôts et des Consignations, INSA Toulouse, Zebau) and in collaboration with the “Chambre de Métiers et de l’Artisanat de la Haute-Garonne” (CMA31), the Federation of Building and Public Works of Haute-Garonne (FBTP31), the Confederation of Crafts and Small Enterprises of the Haute-Garonne Building (CAPEB31), Envirobat Occitanie, the Architects of Renovation in Occitanie (AROC), and the Occitanie Region. This collaborative writing made it possible to emphasise the importance of a mechanism based on a relationship of trust between different parties. This is why the commitments have been assembled to best convey their reciprocity.

### THE CHARTER IS STRUCTURED AROUND FIVE AXES:

1. Sharing a common vision and ambitions
2. Contribute to the smooth functioning of the one-stop-shop scheme
3. Ensure quality of service
4. Commit to the skills improvement
5. Enabling the participation of all in the development and maintenance of the scheme

### THE RENOVATION JOURNEY

The metropolitan one-stop shop is positioned as a trusted third party by offering in particular neutral and quality advice throughout its renovation journey. After a first contact with a one-stop shop advisor, the individual is guided on the technical and financial aspects of the design of his project. Through a diagnosis, several work scenarios are proposed to him. The advisor then directs the individual towards a referencing of the professional member companies and can, if he wishes, accompany him to the reading of the quotes. The individual is then informed about the financial assistance he may receive and the preparation of his financing file. For the duration of the work, the one-stop-shop advisor shall remain available to provide technical support and advice if necessary. Finally, once the work has been completed, the one-stop shop advisor offers monitoring of energy consumption and awareness of eco-gestes that allow energy savings.

**WHY JOIN?** Adherence to this charter demonstrates the willingness of companies to provide quality services to homeowners. The association with the brand image of the one-stop shop of Toulouse Métropole is a guarantee of quality encouraging efficient renovation and going against fraudulent practices. The development of a network of companies that share the same values and maintain a relationship of trust with the employees of Toulouse Métropole’s one-stop shop also brings many benefits, including knowledge sharing, efficiency gains, and optimisation of interventions.

**HOW TO JOIN?** All craftsmen and companies with qualifications in line with their sector of activity and offering their services in the metropolitan area can become partners of the one-stop shop of Toulouse



Métropole<sup>1</sup>. To do this, simply sign this charter, create an account on the platform's website and fill out your company file.

## 3. Commitments between TM and professionals

### 3.1. Sharing a common vision and ambitions

To achieve the quantitative and qualitative objectives of renovation and thus meet the objectives of the Climate-Air-Territorial Energy Plan in terms of reducing energy consumption and greenhouse gases, Toulouse Métropole wishes to encourage energy renovation with the particular by offering advice and support. At the same time, Toulouse Métropole aims to support companies working in energy renovation to meet this growing market, and to contribute simultaneously to the creation of sustainable jobs on the territory. By creating a territorial dynamic and a network of energy renovation stakeholders, it will also promote the sharing and exchange of best practices.

To align with these objectives, the member professional is committed to contributing to the objectives of the Toulouse Métropole Climate-Air-Territorial Energy Plan by adopting a qualitative approach and carrying, among other things, the message of ambitious and global renovation.

### 3.2. Contribute to the proper functioning of the scheme

In order to make Toulouse Métropole's one-stop shop system known and stimulate demand among individuals, Toulouse Métropole will deploy promotional and awareness-raising tools: web page, written documents, participation in local events etc. The individual will then be accompanied by a one-stop shop advisor to integrate one of the routes of the scheme. It can then be oriented towards the directory of professionals. Thus, Toulouse Métropole undertakes to:

1. Promote the professional through referencing, in the form of a directory on the website including a presentation sheet, and to the partners of the one-stop shop.
2. Inform the individual of the existence of a directory.
3. Do not interfere in the pre-existing commercial relations between the individual and his suppliers.
4. Accompany the professional and make available a tool for the creation of 'exemplary achievements' sheets for the general public on the internet platform, and the organisation of visits of 'exemplary achievements'.
5. Provide professionals with communication media on which the professional can affix his stamp for distribution to his clientele.

In order to contribute to the proper functioning of the scheme, the member professional undertakes in return to:

6. Systematically inform the individual of the existence of a neutral and free advice provided by the one-stop shop of Toulouse Métropole, as well as of the existing support arrangements.
7. Update company information on the directory.
8. Reply to requests from Toulouse Métropole.

### 3.3. Ensure quality of service

To encourage individuals to engage in work, Toulouse Métropole undertakes to:

1. Ensure a quality of the advisory service neutral and free of charge for the individual.

In order to facilitate the procedures of the member professional, Toulouse Métropole also undertakes to:

2. Support the individual to optimise requests for quotes and thus improve the conversion rate for member professionals.
3. Make available to professionals a list of the items to be mentioned on the quotes. In addition, it will inform them of the method of analysing quotes used by the one-stop shop in its advice to individuals and will ensure that it is properly applied.
4. Relay technical documentation as well as financial aids to the participating professionals.
5. Relay questions or problems of professionals about new regulations or legal information related to energy renovation to professional organisations and consular chambers, partners of the charter.
6. In case of disputes with an individual, refer the trader to professional organisations so that he can be accompanied on the establishment of an amicable settlement.

In order to ensure that the quality service is provided on the side of the member professionals, they also undertake to:

7. Respect the conditions of membership (see box p. 8).
8. Respond to the requests of the individual in a period of 3 weeks.
9. Only use first-tier subcontracting to another company which itself adheres to this charter and inform the individual about the quote.
10. Propose technical solutions consistent with the diagnosis carried out on behalf of the individual and consistent with the eligibility criteria for financial aid.
11. Promote sustainable development as much as possible through the promotion of bio-based and local materials.





12. Provide instructions for the use of equipment and specify the need for maintenance if necessary. Offer this maintenance service or recommend qualified partners to do so.
13. Punctually participate in surveys and accept that visits of completed achievements can be carried out in the company of an advisor from Toulouse Métropole and private individuals.
14. Do not engage in abusive or misleading commercial solicitation.
15. In the event of a complaint after work, make elements of reply or corrections to promote an amicable settlement.

### 3.4. Commit to the skills improvement

With the aim of empowering professionals in the territory and ensuring their commitment to the scheme, Toulouse Métropole wishes to allow its member professionals to improve their skills. Toulouse Métropole therefore undertakes to:

1. Set up thematic workshops for professionals (e.g.: financial aid, operation of the Toulouse Métropole system, bio-based and local materials, etc.).
2. Relay the information of technical training taking place on the territory (FEEBAT and/or RGE qualifications).
3. Collaborate with professional organisations in the organisation of training specific to the needs of the participating professionals (e.g. FEEBAT Grouping, FEEBAT Ventilation, etc.).
4. Inform the professional of awareness-raising activities on the subject of energy renovation organised on the territory.

In order to enable the member professional to benefit from the benefits of good cooperation, it is also planned to facilitate collaborative working methods. To this end, Toulouse Métropole undertakes to:

5. Encourage collaborative work between craftsmen and craftsmen, prime contractors and/or architects, by working with professional organisations to set up specific training courses dedicated to professionals who adhere to the charter.
6. Organise meetings and feedback to develop the professional network of energy renovation in the territory and collaborate with the partners to facilitate it.
7. Collaborate with professional organisations and federations for the animation of the network and the organisation of training. The exchange with other one-stop shops in the region will be established to identify repetitive events.

For its part, the member professional undertakes to:



8. Participate regularly in meetings and/or training of professionals organised by the one-stop shop Toulouse Métropole and its partners, thus strengthening the network.

### **3.5. Enabling the participation of all in the development and maintenance of the system**

Finally, in order to enable member professionals and partners to participate in the development and improvements of the scheme, Toulouse Métropole undertakes to:

1. Invite the professional to participate in an annual meeting bringing together all the actors of the charter to make a quantitative and qualitative assessment of the actions carried out by the scheme.
2. Listening to member professionals involved in energy renovation and including partners (CMA31, FBTP31, CAPEB31, Envirobat Occitanie, AROCs and the Occitanie Region) in strategic reflections.

In return, the member trader undertakes to:

3. Participate in the strategic review, by regularly participating in exchanges, workshops or annual meetings.

## 4. Membership, exclusion, renewal, termination, follow-up

In order to join the scheme, the renovation professional must meet the following conditions:

- Have one or more qualifications in line with its sector of activity and enable its clients to obtain the financial support attached to it (valid RGE certificate).
- Intervene in metropolitan territory.

In view of the difficulties that some companies may encounter in obtaining the RGE qualification, specific workshops may be organised to accompany voluntary companies and craftsmen.

A committee will be set up to study accession files to the Charter and to verify the validity of the documents to be provided (receipt and processing of files by Toulouse Métropole advisors and validation of the list by the entire committee). Blocking files, as well as cases of companies not complying with their commitments, will be examined by the same committee. Sanctions ranging from temporary suspension to definitive exclusion may be imposed.

Subject to compliance with the conditions of membership, the Charter is automatically renewed each year. The professional can unsubscribe from the device on request at any time.

The committee set up will also record and evaluate the comments of the member professionals. It may decide on an evolution of the terms of the Charter. This new charter will be proposed for the signature of building professionals on the due date originally scheduled.