



COLLABORATION FORUMS



Guide for Establishing Collaboration Forums

City of Lappeenranta

27 February 2024

Version 2.0 20 January 2025





About RenoWave



The project “One-Stop-Shop extended model to increase the multi-apartment building stock renovation in the BSR” (RenoWave) establishes cooperation among homeowners, construction companies, energy agencies, and public authorities to initiate more energy-efficiency renovations in multi-apartment buildings. The main result of the RenoWave project will be a One-Stop-Shop (OSS) model that includes traditional and additional OSS services that cover all the steps necessary to initiate and implement energy-efficiency renovation projects in multi-apartment buildings. The RenoWave project is implemented under the Interreg Baltic Sea Region Program 2021-2027 with the support of the European Regional Development Fund. Implementation time of the RenoWave project is January 2023 to December 2025.

Project partners

1. County Board of Dalarna (Sweden)
2. City of Lappeenranta (Finland)
3. Vidzeme Planning Region (Latvia)
4. Association of Communes and Cities of Małopolska Region (Poland)
5. Magistrat of the City Bremerhaven (Germany)
6. Baltic Environmental Forum Latvia (Latvia)
7. Housing Initiative for Eastern Europe (Germany)
8. Let's renovate the city NGO (Lithuania)
9. Polish Foundation for Energy Efficiency (Poland)
10. North Sweden Energy Agency (Sweden)
11. Development Centre of Võru County (Estonia)

Summary of Deliverable

The Collaboration Forum Guide provides useful instructions and practical advice about the establishment of a Collaboration Forum. In addition, the guide provides targeted tips based on the city, country or region where a new collaboration forum is planned to be established.

Abbreviations in the guide:

EE = energy efficiency

EV = electric vehicle

GDPR = General Data Protection Regulation

HOMAB = home owned multifamily apartment building

NGO = non-governmental organization

OSS = one stop shop

Q/A = questions / answers

RES = renewable energy sources



www.interreg-baltic.eu/project/RenoWave

The project RenoWave establishes cooperation among homeowners, construction companies, energy agencies, and public authorities to initiate more energy-efficiency renovations in multi-apartment buildings.



What is a Collaboration Forum?



The basic idea of the Collaboration forum is very simple. The aim is to facilitate cooperation between multifamily apartments and bring together the decision makers (i.e., board chairmen and board members) of HOMABs in the city/region/own district/neighbourhood.

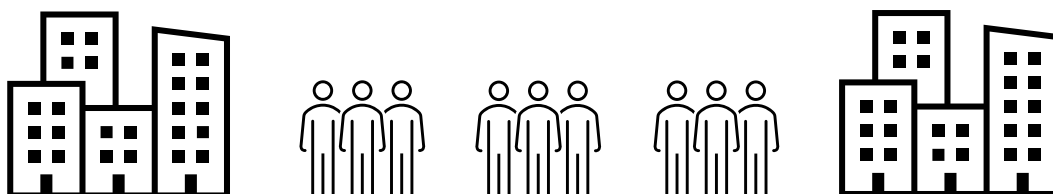
The main purpose for a collaboration forum is to establish and enable a framework in order to facilitate a regular meeting place where all types of housing associations can promote their energy efficiency measures. All members participate in the forum activities voluntarily, and the forum has no official or legal status. The collaboration forum is a rewarding meeting place, especially when the members have similar renovation, energy efficiency and renewable energy needs and targets.

Depending on the agreed responsibilities, regional or local authorities, NGOs, sectoral agencies, private enterprises or other appropriate organizations can facilitate and assist in the establishing phase of forum activities. The forum provides a platform for sharing information, engaging discussions and exchanging good practices, experiences, and expertise among its members. The forum offers participants a comprehensive and fruitful platform for continuously enhancing the energy

efficiency of their own buildings. The continuously increased know-how and understanding of energy efficiency, renewable energy and implementation of renovations will be ensured by inviting experts, authorities, energy companies and service providers to inform and promote the existing best practices and solutions.

The main goal of a collaboration forum can vary, and it should be discussed together with forum participants. The figure below summarises the idea and cooperation activities of a collaboration forum. Some activities include inviting experts and companies to present their existing solutions.

This can inspire forum members to jointly implement practical EE measures in their buildings as a group procurement. The benefit of this example is that it is possible to reduce the administrative burden on HOMABs and also unit prices can become more affordable. The same applies from the service provider's point of view. The group procurement is appealing when there are several HOMABs interested in implementing the same measure. This can be the situation especially when buildings are in the same age.



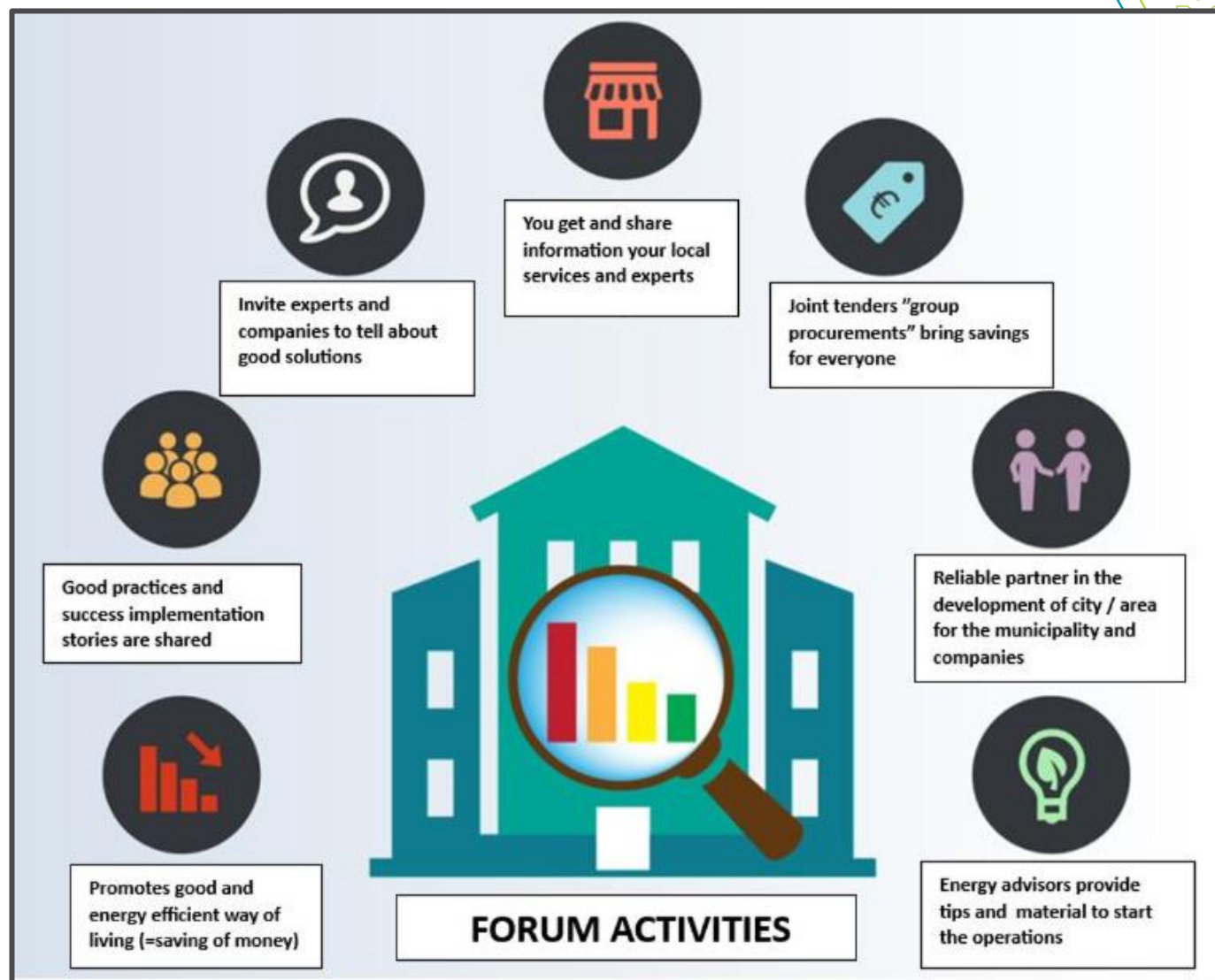


Figure 1. Examples of activities within a collaboration forum.

Original Finnish version provided by **Motiva**

Below, a few interesting Finnish references, examples and articles regarding existing cooperation between HOMABs to inspire establishing more local forums:

- [Building Association Club at Helsinki area](#)
- [Handbook for building association club activities](#)
- [The Finnish Real Estate Federation](#)
- [Bachelor's thesis: joint procurements in housing companies](#)
- [Collaboration of at Tapiola](#)
- [Motiva release: Case Lappeenranta](#)

Roadmap for establishing a collaboration forum – a step by step guide

Before the practical establishment steps of collaboration forums, it is essential to agree with the main purpose of the forum and to select appropriate leadership. Also, the participating HOMABs and other stakeholders should be decided and invited based on purpose. Furthermore, conducting a survey or investigation on already existing forums models or platforms may bring valuable background information. This will help to figure out how to



set up a workable model which will be the best one for local circumstances.

Step 1



Clarify how HOMABs and board chairmen / board members can be invited to join the collaboration forum. Consider if the contact information of HOMABs' decision makers could be available via building manager service companies or other existing data sources without any conflict with GDPR rules.

Advertise the upcoming forum establishment for stakeholders on websites, social media channels, event calendars, newsletters and by participating in relevant events related to the idea of collaboration forum. Justify the forum to potential participants, what is the main idea, purpose and target of the forum (for example, you can utilize the figure 1).

Connect all relevant local stakeholders: EE and renewable energy experts, service providers, cities, municipalities, authorities, associations, housing manager companies and housing managers, energy companies, organizations promoting energy and climate issues etc.

Commercial advertising channels can also be used. Ensure the funding source for relevant costs of forum operations.

Step 2



Ensure that the first forum event will have enough participants. If you can gather a great number of participants, consider forming several sub-groups based on technical details like year of construction, building area, primary energy source, final energy consumption, existing energy class etc. Additionally, other topics can be used to form groups based on interest areas, like geographical location,

management of the building, water consumption, waste disposal, cleaning of outdoor areas, green and attractive surroundings, gardening issues, sharing economy, energy poverty etc.

Consider how to gather confirmation of participation before the event, if essential.

Consider, discuss and decide, will the event be organized as hybrid, onsite or online. Based on the format of the event, ensure that the facilities are suitable. It is suggested to organize some catering services for participants to get them involved, if the event is onsite or hybrid (note, the cost budget).

Step 3



In the first meeting, discuss and agree – in full cooperation with the participants – the targets and the way to achieve them, in addition to all other practical arrangements.

Have all participants introduce themselves. Ask the participants to describe their role as HOMABs representative or as another stakeholder.

Furthermore, a summary of each participant's personal background and interests regarding energy efficiency issues shall be conducted. The summary should include their own experiences, know-how, current plans and targets regarding energy efficiency, renovations, energy investments, renewable energy etc. in their HOMAB.

Discuss and decide if it is necessary to draft a memo of the meeting. If yes, who will be writing it and taking care of the delivery to all relevant stakeholders.

Discuss and decide if it is needed to record the meetings if they are organized online or hybrid.



Take care of accessibility requirements and how the recording will be shared.

Discuss generally if presentations of invited experts are allowed to be shared to participants. This item shall be ensured with each presenter separately in every meeting.

As a summary, **the agenda of the first meeting** could be the following:

1. Basic idea of the forum

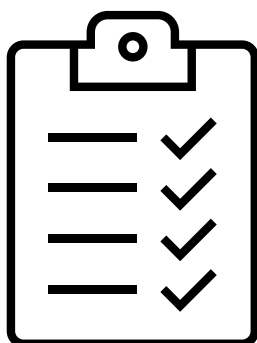
- General information about energy efficiency and existing EE services

2. Introduction of participants and discussions

- Expectations and wishes
- Current status of HOMABs buildings (implemented renovations and future plans)

3. First presentation(s) by EE expert(s)

4. Next meeting



At the first forum meeting, **an initial questionnaire** can be launched with the following questions which will help clarify and define joint targets for forum members:

1. Contact information of the representative of HOMAB (name, e-mail address)

2. Basic information of the building (name of building association, address, year of construction)

3. Total number of apartments and construction area (m²)

4. Describe with your own words the relevant details of the building

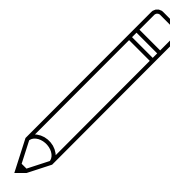
5. Describe the current plans of renovations and EE measures and if you would like to receive more information/training to implement those plans

6. Describe measures/activities, if your HOMAB would possibly be interested to organise a "group procurement" in cooperation with other forum members

7. Good (or bad) practises and examples, in which you have experience and would like to share with others

8. Communication regarding forum meetings and also between meetings: is there need to establish for example whatsapp / facebook group / mailing list for participants

9. Other wishes for the activities of the forum



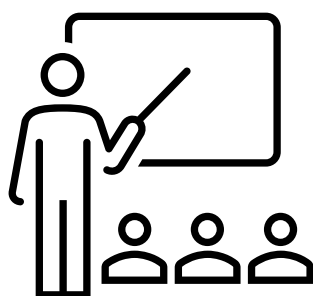


Step 4



Agree on how to continue with collaboration forum activities. For example, the following items should be decided:

1. Who will be the convener of the next meeting
2. How often will the meeting happen
3. What would be the most suitable time schedule for meetings (in the daytime or after working hours etc.)
4. Topics and presenters/experts for the next meeting(s) and who will contact them
5. Will the next meeting(s) be organized online or face-to-face
6. Communication and advertising
7. The sharing of presented material to participants
8. Agree on the exact meeting time of the next event
9. How the relevant costs of forum activities will be covered



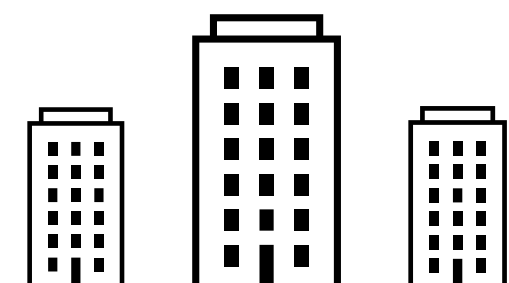
What are the main favourable factors and how to benefit from them?



The collaboration forum is a rewarding meeting place for information exchange for board chairmen, board members and other involved stakeholders. At the same time, it is a fruitful event where good practices, good (or bad) experiences, information and know-how will be shared to all interested parties.

Additionally, there will be valuable information available about topics, such as how to reduce energy consumption and the use of renewable energy sources. The forum encourages to promote a good and energy efficient way of living. It is a place where members can start to plan the implementation of practical joint EE measures, especially when they have similar needs and targets regarding renovation, energy efficiency and renewable energy.

These plans can be supported by inviting EE experts and service providers to introduce services, products and other opportunities that they are providing.





What are the main challenges and how to overcome them?



Challenge 1

Finding the “right people” (decision makers of HOMABs: board chairmen and board members) to join the forum activities. Additionally, getting more active members to join the forum.

How to overcome this challenge:

Advertise the upcoming forum event for stakeholders on websites, social media channels, event calendars, newsletters and during other relevant events. Participate in events where you can meet potential participants to join forum activities. Also be prepared for a lot of “manual work” or “direct & personal contacts” to find members to forum (phone calls etc).

Challenge 2

Finding the correct person (EE expert, service provider, renewable energy expert, EV-charging expert etc.) to make the presentation(s), increase know-how and share good practices.

How to overcome this challenge:

Maintain a sufficient network and expand the network actively for example by participating in various events where you will meet experts.

Challenge 3

Should the event be organized as a hybrid, onsite or online event?

How to overcome this challenge:

Decide the most convenient format and based on the format of event, ensure that the facilities are suitable. It is suggested to organize some catering services for participants to get them involved, if the event is onsite/hybrid. The format can vary between events. Perhaps 2-3 onsite/hybrid events are enough in a year. The advantage of onsite events is that all the discussions and sharing of know-how is more concrete compared to online events.

Challenge 4

Defining the most convenient time slot for the forum events.

How to overcome this challenge:

Open and active discussion with forum members. Retired and working participants can prefer different time slots. Decide and inform the meeting times early enough before the next meeting(s). Also consider and suggest, if a regular fixed time is the most suitable for the majority of participants.

Challenge 5

Taking care of time management at forum meetings.

How to overcome this challenge:

Create a detailed agenda for the event. Agree on the exact time slots for each topic and presentator. Actively control the use of time during the meeting. In addition, carefully concern the number of topics in each event. Make sure to have sufficient time for Q/A and discussions.



Challenge 6

Ensuring the common understanding and joint targets for the forum activities.

How to overcome this challenge:

Conduct an initial questionnaire to forum members, which will clarify possibilities on how to organize the cooperation within forum members, topics to be taken on the agenda at future forum meetings and other wishes.

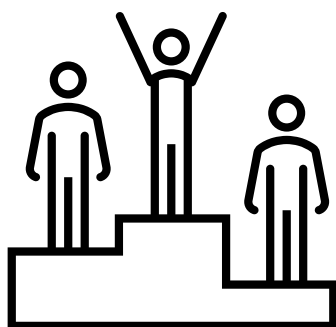
Challenge 7

Ensuring that the forum stays lively, active and inspires more members to participate in the activities in the future.

How to overcome this challenge:

Invite “Good (or Bad) Examples and Good Practices” to the meeting. These can be cases where energy efficient renovations or other innovative measures with concrete results have already been conducted.

Plan the implementation of joint EE measures together with forum members according to the “group procurement” model. If needed, find a solution in accordance with your country’s or region’s practices to enable the forum to pay fees and purchase services.



Special aspects to take into account in each country in the establishment process

Sweden



All Swedish HOMABs are registered legal entities and organized through an annual assembly that elects a board. The board is then responsible for the management and finances of the buildings. It is the board of the association that should be invited to the collaboration forum, and the chairperson is a suitable contact person. In addition to the chairperson, it is also appropriate for the treasurer, the energy manager, and the property manager to participate in the forum meeting.

The HOMABs are often connected to regional and/or national HOMAB associations. In some cases, there is existing collaboration between HOMABs within these associations, but most HOMABs are not involved in any collaboration forums. Collaboration forums focusing on energy are rare.

HOMABs that are connected to regional and/or national HOMAB associations (HSB, Riksborgen, SBC, Nabo, etc.) find it easier to access support, even though these services often involve costs. Therefore, independent collaboration forums become especially important for those not connected to a HOMAB association. The fact that HOMABs and their boards are publicly registered makes it easy to locate, contact, and categorize HOMABs. For example, it is possible to order registries of HOMABs that include contact details.

In addition to collaborating with local or regional energy service providers, it can be effective to work with the municipal energy and climate advisor within the collaboration forum.



Poland



In Poland, there is currently no existing collaboration between HOMABs. There are HOMABs associations but they don't cooperate between each other at the moment. Initial plans on how a collaboration forum will be established in cooperation with local media and advisory group for the renewable energy and energy conservation sector have been made. The aim is to organize two collaboration forums: one in Sosnowiec and another in Malopolska Region. The kick-off of forum will start at the local event from 2024, where a separate panel for HOMABs will introduce the idea of the forum.

In Sosnowiec, 3 meetings with HOMABs, experts, financial institutions will start. The meetings will cover 3 main topics and involve about 15 organizations.

In Kraków, the activity starts with 3 meetings with HOMABs, experts, companies and municipalities.

Estonia



In Estonia, the collaboration forum between HOMABs was launched in June 2023 and six meetings have been held. The forum kick-off event attracted about 20-30 participants and the first event was organized by Võrumaa Arenduskeskus. The number of participants has been steady over the next meetings. Some tips could be useful for other stakeholders.

Currently, all counties in Estonia have development centres and a centrally funded consultant communicating information about the support schemes managed by KredEx/EIS. The collaboration forums should be organised at least on a county level and in collaboration with this existing service from KredEx.

While creating and managing the collaboration forums, a lot of various means of communication should be used. It is the experience from the previous meetings that both local newspapers (digital and printed), Facebook, and even ads on supermarket screens are necessary to distribute the information. It should also be noted that the first events might be organized as physical meetings, but at one point a hybrid version should be considered. Hybrid events attract participants that otherwise would be reluctant to participate, have mobility issues, or otherwise prefer digital interaction.

Lithuania



In Lithuania, there is an existing collaboration forum called "Knowledge Network Group", which was initiated by Amiestas. This initiative came from another European project and the aim is to promote deep renovation in Vilnius.

The group consists of various experts and HOMABs. Once a month, Amiestas is organising different events, such as meeting with local experts who provide various services for renovation projects. In those meetings, HOMABs and other guests are introduced to different topics (heat recovery systems, façade solutions, connecting with other EE initiatives) accompanied by discussions.

It is important to check what is interesting for participants, therefore Amiestas conducts surveys to find out the most relevant topics and organises the meetings according to them. The success factor of the Amiestas forum is to constantly remind the participants that they don't have to decide on anything yet, because these events are organised to inform and share good practices. It helps to keep the connection between Amiestas, HOMABs and experts.



Latvia



In Latvia, there is currently no existing regular collaboration between HOMABs. However, there are several public organizations, which can assist in the establishment process to create a collaboration forum for HOMABs. These organizations promote EE issues and renovations in their events and are ready to cooperate with project partners in Latvia. For the local forum, the aim is to gather a wider audience than only HOMABs.

The increasing need of knowhow for HOMABs can be provided by EE experts, who are directly involved and assisting the HOMABs to move towards building renovation. The current plan is to have the kick-off of the forum activities at the beginning of 2024. Forums will be organized in different places, focusing on selected pilot buildings.

The chosen approach to organizing forums in Vidzeme did not achieve the planned success; however, the direction is correct - work must continue with an individual approach, focusing on smaller communities, as the situations in cities and rural areas differ significantly, including understanding of building renovation and varying needs. It was concluded that the chosen solution would work better over a longer time frame, as decision-making takes considerable time for most people, as does reaching the core issues and engaging in meaningful discussions.

Vidzeme's territory is extensive, making it a significant challenge to bring all HOMABs together in one place. On the other hand, an online forum would likely fail to reach a large portion of the audience in rural areas, which is a very important target group. In cities, professional management companies predominantly operate, whereas, in rural areas, management is most often handled by residents

themselves or by associations they have established. The one-stop agency created by the Vidzeme Planning Region, **Vidzeme Energy Guide**, will continue to provide consultations to residents and participate in residents' meetings in person, traveling to them as needed. It will also seek the best solutions for continuing the forum and improving its operation.

Germany



In Germany, in the city of Bremerhaven, there are several existing formats to reach homeowners and consumers. Two main collaboration channels will be introduced in 2024, the first will be held on district level and the other will work on city level. The district level approach in "Alte Bürger" was participatory developed. It is called roundtable "Wärme" (Eng. "heat"). There, house- and flat-owners discuss the possibilities to implement heating systems, including RES based, on the specific renovation scheme already developed for the district in the past year.

The main outcome of this approach is to gain planning reliability for those who plan heating for the houses themselves. An important prerequisite is to decarbonize heating systems. This moderated roundtable will take place every three months and will be developed further under the participation of its members.

The second form of collaboration is cooperation between the city and the grid operator and involves mainly market partners like craftsmen, planners, architects and engineers. They will be informed that only 30% of the city will be covered by city heating and the other 70% must find their own solutions for heating supply which is the main step for the planning in houses. The municipality's goal is to influence the market partners to take the common heating strategy in account. As a result, homeowners will be able to decide within the given possibilities to renovate their homes.



In Finland, the forum has been established at the beginning of 2021 and it has regular monthly activities between September and May. In the summertime, there is a break in the forum activities. Energy audits for HOMABs were conducted at the end of 2023. The implementation of the joint EE measures is planned based on the results of the audits and according to group procurement principles towards the extended all-inclusive OSS model.

During 2024 forum organized totally six events, which were focusing on learning more about cooperation by piloting group procurements. The idea of group procurements is, how private multiapartment buildings can gain economic advance and save money by achieving lower unit prices.

The first practical activity was to conduct energy audits for voluntary 13 buildings. Based on the results of the audits, a more detailed planning phase was implemented for four chosen pilot group procurement measures (solar panel installation, exhaust air heat pumps, powered roof extractor and renewing of heat exchanger equipment).

As the result of the planning phase a project plan was presented including the comparison of the costs, if the procurement is carried out for one or for several housing associations. Based on received tenders by suppliers the saving potential of measures is following: solar panel installation (9% saving potential), exhaust air heat pumps (3%), powered roof extractor (4%) and renewing of heat exchanger equipment (0-1%).

The real implementation phase of measures will continue on 2025 by three buildings.

Evaluation template for the piloting of the forum establishment



The evaluation template can be found by clicking [this hyperlink](#).



One-Stop-Shop extended model to increase the multi-apartment building stock renovation in the Baltic Sea Region



Länsstyrelsen
Dalarnas län



Energikontor
Norr



LAPPEENRANTA



SEESTADT
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VIDZEME
THE ONLY WAY IS UP!



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ARENDUSKESKUS



STOWARZYSZENIE
GMIN I POWIATÓW
MAŁOPOLSKI



Polish
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Project «One-Stop-Shop extended model to increase the multi-apartment building stock renovation in the BSR» (RenoWave) is implemented with the support from the EU funding Programme Interreg Baltic Sea Region 2021 -2027. The project develops One-Stop-Shop extended model specifically designed for the multi-apartment buildings in Baltic Sea Region countries. Partner