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ACTION PLAN

Social Green
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Action Plan Social Green - Extremadura Energy Agency

SOCIAL GREEN, Regional Policies towards Greening the Social Housing Sector, aims to:

- Improve regional policy instruments targeting the link between the social housing sector and fuel poverty.
- Develop and implement greener social housing sector policies, targeting new constructions or retrofitting existing buildings.

Each region that composes the consortium will develop their **action plan** and will implement it during the project's second phase. This document will provide details on **how** the lessons learnt from the cooperation will be exploited to improve the policy instrument tackled within our region. It specifies the nature of the actions to be implemented, their timeframe, the players involved, the costs and funding sources.

It is the key document elaborated throughout the project, and it will integrate conclusions from our regional self-assessment of the situation regarding social housing, the lessons learnt from the stakeholders' participation and the knowledge exchanged through the project's activities and events. All this will develop in long-lasting results and impacts in our region.

For Extremadura, this action plan will help us develop a comprehensive and effective regional policy to support and improve energy efficiency standards in new and existing social housing, as well as funding schemes that will make this possible. This will be achieved through three objectives: (1) implementing new projects in Extremadura, (2) achieving changes in the management of the policy instrument and (3) making changes in the strategic focus of the policy instrument.

The development of the action plan for Extremadura has been based on the collaboration of those entities involved and capable of playing a key role in improving and "greening" the region's social housing stock. The regional government, Junta de Extremadura, has participated and supported at all time the work developed by AGENEX. Input and assistance has also been provided by URVIPEXSA, one of the most relevant stakeholders for this project, as well as some help from external experts that have been contracted for this specific matter.

Among the conclusions drawn from our regional self-assessment, the following key findings can be defined:

The housing policies that have been developed in Extremadura in the past few years have focused mainly on approaching the right of housing. The sectoral plans have been structured based on priority objectives, among which we can highlight: improving access to housing, creating working groups to implement a consensus eviction protocol, reducing energy poverty, favouring housing solutions for vulnerable or excluded groups, protect victims of abuse with housing, promote accessibility for the disabled and promote youth emancipation with accessible housing. This has resulted in social housing indicators that are more favourable than in other regions in Spain but, there is still a lot of work to do.

The Spanish regulation contemplates different levels of social housing that vary depending on the needs and possibilities of those they are addressed to. Traditional pure social housing has been developed by regional or local governments for more than 30 years. It was initially intended for renting for a very low under-market price but, due to many difficulties encountered, there is currently a desire to sell them, especially from the local level. This type of social housing in Extremadura represents less than 3% of the total building stock, which is far away from the real necessities in the region. Nevertheless, there is another type of subsidized housing that is known as protected housing, and that represents a higher percentage.

The latter is targeted to youngsters, low-income families or simply couples that have just begun their professional career. The cost of these houses is lower than market but their purchase implies specific conditions that must be met by the buyers. The aim of this type of housing is to be sold, unlike pure social housing that, until now, is rented to those families that need it the most.

Protected housing is managed by the Public Administration, and it establishes a number of requirements that must be met, as maximum size, annual income or advantageous financing. Inside this group of housing there are also various sub-types depending on the support given but it is not relevant at this point. What is relevant is that protected housing does not have any specific support to promote energy efficiency and renewable energies, just the regular funds available for general housing. This entails an issue as, on one hand the owners of protected housing usually can't afford to invest in energy improvements, and on the other hand, the requirements asked for to access these funds are harder to reach due to the lower construction price per square metre. This situation is compounded when referring to social housing, where no energy renovation works are currently carried out.

Despite the existing programmes and policy instruments, the main problem is the shortage of funds allocated for these tasks, due to the current general economic situation in our region, but also at national and European level.

<p>STRENGTHS (+)</p> 	<ul style="list-style-type: none"> • Experience of Regional Government in social housing (more than 30 years, since 1984). • Technology already developed 
<p>WEAKNESSES (-)</p> 	<ul style="list-style-type: none"> • Reduced operating capacity of Regional Government due to limited budget • Little involvement of the private sector • Social housing with limited price per square meter (€/m²) while quality standards of housing increase. • Tenants do not carry out any work in dwellings 
<p>OPPORTUNITIES (+)</p> 	<ul style="list-style-type: none"> • There are funds to promote Energy Efficiency and Renewable Energies in general housing but there is no supporting for social housing • Knowledge of renovation policies • No energy renovation works carried out in social housing: 0% renovations • High percentage of tenants interested in buying the dwelling: (64%) 
<p>THREATS (-)</p> 	<ul style="list-style-type: none"> • Reduction of purchasing power of low-income families due to the economic crisis (more families need help). • Misuse of facilities by social housing users. • More than 25% of tenants have problems paying the rent 

SOCIAL BUILDINGS SWOT ANALYSIS – EXTREMADURA (SPAIN)

General information

Project: Social Green

Partner organisation: Extremadura Energy Agency

Country: Spain

NUTS2 region: Extremadura (ES43)

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This Action Plan has been designed by Extremadura Energy Agency (AGENEX). The foreseen actions in it will be carried out with the coordination of the Directorate General for Architecture of Junta de Extremadura.

And the aim of action 4 is to achieve a type 3 improvement by changing the strategic focus of the policy instrument; although this action is the most challenging, it will be built on the advances made by other Interreg projects in the region, and be transferred to Social Green project.

AGENEX is not the managing authority capable of developing these improvements and for this reason key stakeholders, mainly from the regional government and the entities responsible for managing social housing, were involved in the project and its activities since the beginning. Some of the activities that are included in actions 1 and 2 include the outcome of actions developed by the managing authority during phase 1, thanks to their participation in the first phase of Social Green project.

ACTION 1. Construction of new social housing units with higher EE standards using improved ROP policy instruments.

BACKGROUND

The background related to this action is based on the exchange of experience with the project's partner countries, who all coincided that the economic issue was the main reason for not having achieved greener social housing in their regions or countries. If one thing has been shared throughout the first phase of Social Green project is that to achieve "greener" social housing, high investments are required. The involvement of regional stakeholders in the project and their involvement in transnational events have resulted in the idea behind this first action. It can be summarized in one sentence: the need to figure out a cheaper way of building social housing that is energy efficient. From this fact, regional stakeholders realized the need to develop more efficient measures increasing as least as possible the construction costs, and the idea of developing a research project arose. The preparation of this project was very much in line with Social Green and coincided in time with its first phase. This pilot project will be developed by Junta Extremadura under a European programme, Life, and it will coincide in time with phase two of Social Green project. In fact, the latter was the trigger. So they will jointly provide feedback so the results can be integrated in the new projects constructed in Extremadura in the upcoming months.

A second learning is related to the size and characteristics of the social housing in other European regions and countries, as well as the duration of the housing assignment. Since the beginning, all the social houses built in Extremadura were the same, approximately 80 square metres big and no garage, and once they were given, it was usually on a long-term basis. The idea of introducing changes in this system also arose during the project's phase one, and will be transferred to Extremadura region when designing new projects, in order to achieve a better relation between a family's needs and the housing provided.

This action is linked to action 3 in a way that 50 new units have been estimated to be built by the regional government but, this figure may vary depending on the results obtained when analysing the demand and current needs for social housing in the region.

This action will include a pilot project to study the use of different local materials in buildings to reach a higher efficiency without increasing construction costs.

The European directives are urging public administrations to formulate policies and adopt measures to stimulate the transformation of buildings, both new and those that have to be reformed, to turn them into buildings with almost zero energy consumption. This guideline is mandatory for the public sector as of December 31, 2018 and will be for private constructions, too. This obliges to include innovative renewable solutions in the pilot houses, so not only energy consumption can be reduced, but so the small amount needed is provided by renewable sources. The evidence of success will allow similar solutions to be included in the new projects built by the regional government, for which AGENEX will provide their support.

ACTIONS TO BE IMPLEMENTED

This action contemplates the construction of new social housing units with higher EE standards. This will require a number of activities to make sure that not only the new projects meet the region's needs, but also that the techniques used for the construction are the most appropriate from an energy point of view and the most feasible from an economic point of view.

▣ **Technical study to include higher EE standards.**

AGENEX will work jointly with the regional government through its DG Architecture to integrate the results and conclusions drawn from the pilot projects. There will be four pilot houses testing different autochthonous materials and technical solutions to reduce their energy consumption. Those that achieve better results will be promoted for the new construction of social housing by the regional government.

▣ **Pre-feasibility study for the integration of RES.**

AGENEX will be responsible for analysing the possibility of integrating renewable energy systems in the houses, most likely PV panels on the roof or the facade. All through the project preparation, development and monitoring, AGENEX will offer advice and support in this matter due to the experience the Agency has with renewable energy installations.

▣ **Monitoring system.**

The energy consumption will be monitored after the project is finished to analyse the data and include it in the resulting study. This monitoring will allow the impacts achieved to endure in time for future projects.

▣ **Project definition for new units considering the best results.**

This final activity is the most important in this action because it will influence the managing authority when implementing new projects of social housing to increase their EE standards. The solutions to achieve this will be defined based on the previous studies. Expected outcome

EXPECTED OUTCOME

The expected outcome of this action is the development of at least 50 units of new and greener social housing. There will be two important considerations taken into account when developing these new projects. On one hand, the characteristics of the housing will vary depending on the needs of the beneficiaries; and on the other hand, the new housing will be greener as the results from pilot projects developed in the region will be taken into account when designing the new units.

These changes will result in better policies to fight energy poverty thanks to a well-organized collaboration between the parties involved.

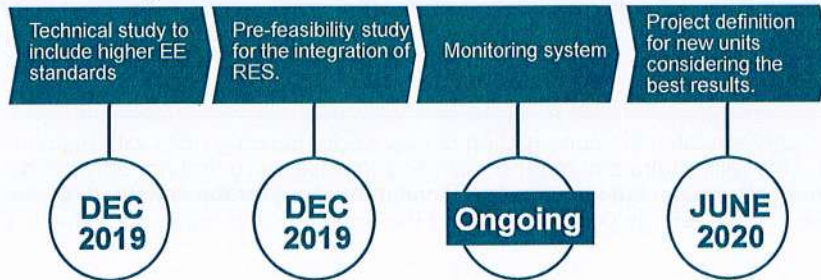
PLAYERS INVOLVED

The most important player that will be involved in developing these actions will be the Regional Ministry for Social Affairs and Health, through its DG Architecture. This is the entity responsible for deciding on the new projects in the region, jointly with URVIPEXSA, that is the public entity in charge of promoting new social and protected housing in Extremadura, considering the technical solutions that should be implemented during the new projects. They are both participating in the pilot project, which idea came up during the first phase of Social Green.

AGENEX will have a key role in contributing to the energy matters of the project, focusing on the best way of integrating RES in housing and determining those technologies that are more cost-effective.

TIMEFRAME

The first action of the Action Plan for Extremadura TOWARDS GREENING THE SOCIAL HOUSING SECTOR has the following activities and deadlines:



COSTS (if relevant)

The support given by AGENEX to the regional government has begun during the first phase of the project, and will follow up until the end of the project. For the implementation of this action, AGENEX will enable staff with its own resources to give support the government throughout phase 2 of the project, estimating 1PM/year. (30.000€/PM). The regional government will assign their own technicians, estimating 2PM/year (40.000€/PM).

The cost of developing 50 new units has not yet been estimated, as it will depend on the implementation of the results from the studies.

FUNDING SOURCES (if relevant):

The funding source will be the regional budget allocation for social housing

ACTION 2. Retrofitting of existing social housing, owned by Regional Government and of the former social housing bought by the tenants using improved ROP policy instruments

BACKGROUND

The objective of this action is to promote and develop actions to improve energy efficiency and renewable energies in existing social housing; as well as to promote energy savings and reduce greenhouse gas emissions, in a context of sustainable growth, to increase the quality of the building and the health and comfort of the users.

The background related to this action is again based on the contribution received by all the project partners and the lessons learnt by AGENEX's staff and regional stakeholders when attending the interregional events.

In the Social Green kick-off meeting that was held in Portugal we observed that the increase of social exclusion was something common to both regions, Norte and Extremadura; and that the difficulties encountered with the maintenance of social housing was also a common issue. This last one gets worse in multifamily dwellings that have different owners, in the case of Extremadura it happens with blocks of flats initially owned by the government but in which some of the housing has been bought by the tenants. Although the desire to sell the units was triggered by the need to reduce costs, the situation in which there is a split ownership has made the management of the building very hard work. One of the lessons learned during the project was to sell only the detached social houses.

Other problems identified are the defaults and the lack of care that some tenants have with the housing that has been provided for them, having negative consequences in the whole neighbourhood and creating ghettos. We encountered the same situation in the study visits held in Croatia, but there wasn't a strong will to change it as it was considered it would encourage tenants to leave when possible. An example of the opposite would be France, which's scheme of annual revisions was selected as a good practice and has been considered for the third action. In France, the annual revision is used to determine if changes should be made, for instance: the need of a bigger/smaller house; a reduction or a raise in the rent paid by the tenants; or even the improvement of their situation and therefore they no longer need the social housing at all.

In order to solve the situation of the housing problem identified throughout the project, the Royal Decree 106/2018 of March 9 is approved, regulating the State Housing Plan 2018-2021, in which a Development Program is carried out to promote urban renewal and regeneration with a final purpose of financing the execution of deep renovation works. This encompasses both buildings and single-family homes, including the urbanization or redevelopment of public spaces.

ACTIONS TO BE IMPLEMENTED

Given the precarious situation of the social housing park of Extremadura and the neighbourhoods where they are located, and the approval of the State Housing Plan 2018-2021, URVIPEXSA as a public company under the regional government responsible for the region's social housing stock, and as a key stakeholder in Social Green project very involved in the interregional learning activities, proposes during phase 1 the possibility of a broad action for retrofitting neighbourhoods, with special emphasis on energy efficiency and accessibility of both housing and surrounding urban areas.

This general action for retrofitting works in existing social housing will be developed in different stages, but an estimate of 200 units has been identified before the end of this programming period.

The main objective of this action is to promote and develop sub-actions to improve energy efficiency and renewable energies in existing social housing, both the one owned by the regional government and that one bought by tenants. As a result, this action will improve the regional operational programme by promoting energy savings and reducing greenhouse gas emissions, in a context of sustainable growth, to increase the quality of the buildings and the health and comfort of the users.

The sub-actions or activities are the following:

Design of a coordinated strategy on the use of available funds for retrofitting existing social housing.

This includes the need to identify regional and national funds available and to define the coordinated strategy. It also includes the need of regular meetings with all the stakeholders involved.

This strategy will include specifications depending on if the housing is owned by Junta Extremadura or private owners.

Identification of suitable projects.

This will be done by identifying potential improvements in EE and RES; identifying the urge of these improvements and elaborating a ranked list to apply for the available funding.

In order to minimize the risks in the management, the proposed actions will be carried out in groups of social housing in which the majority of their ownership belongs to Junta Extremadura. It is a fact that the housing that is currently in a more precarious situation is indeed the one owned by the government. Preliminary studies have determined that the private housing subject to these renovations is below 10 per cent.

Elaboration of the most suitable funding mixed scheme for each improvement.

Funding opportunities will be evaluated for each of the improvements ranked on the list as well as a timeline to apply for this funding. These conditions may vary depending on if the ownership is public or private. The most suitable option is likely to blend regional and national funding, the percentage is still not clear, but during phase 1 of the project it was proved that regional funds weren't enough and some approaches have already started to be analysed by the regional government.

Identification of the legal requirements.

Through this activity support will be provided to help identify the legal requirements and the documentation needed to apply for funding, both to the regional government and to the private owners and community associations.

Creation of awareness campaigns.

The creation of awareness campaigns among owner communities and associations to promote investments will be done by: designing the campaign, contacting these associations to engage them and gathering information.

Implementation of the retrofitting projects.

EXPECTED OUTCOME

The expected outcomes of this action is, firstly, to improve the ROP through the promotion of energy savings and reducing greenhouse gas emissions by improving the energy efficiency in the housing sector. Secondly, these actions will reduce social inequality improving the quality of social buildings and ensuring the health and comfort of the users, as well as economic savings for them,

Before the end of the current programming period, these benefits will be implemented in at least 200 units in various municipalities of Extremadura.

PLAYERS INVOLVED

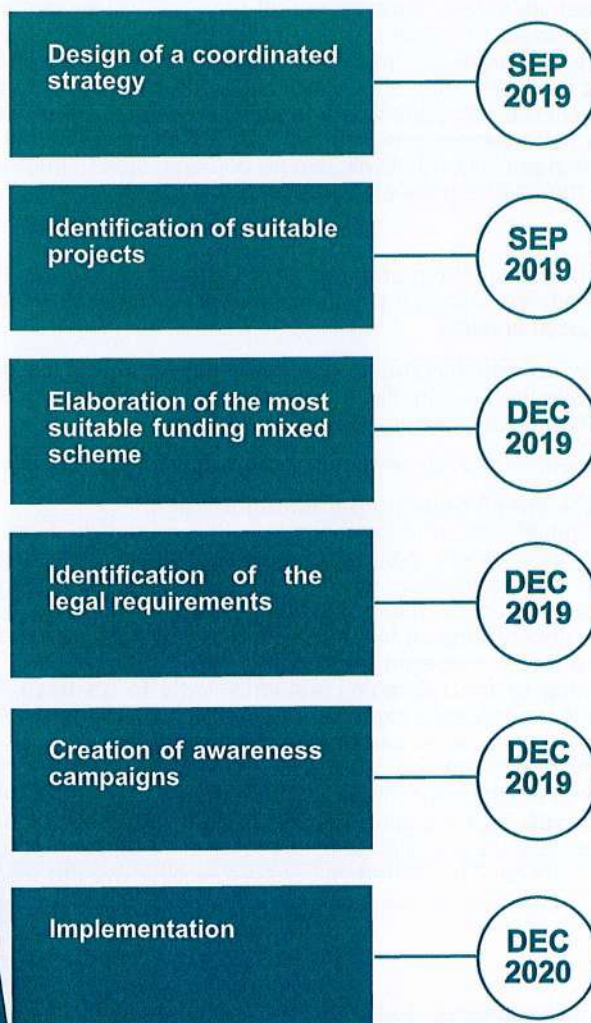
The most relevant player involved in this action is URVIPEXSA, the public entity under the regional government in charge of promoting new social and protected housing in Extremadura, in this case not by promoting new housing but improving the existing one.

This action will also involve local councils (as the housing is located in several municipalities) through their technical services when processing the architectural and urban planning documents.

The regional government of Extremadura, as the Managing Authority, will also be a relevant key player to make this action possible. AGENEX will also be present, to support the regional government in the first case scenario, and to support the owners association in the second case. Building renovation and construction companies will also be involved, as well as energy services companies.

TIMEFRAME

The second action of the Action Plan for Extremadura TOWARDS GREENING THE SOCIAL HOUSING SECTOR has the following activities and deadlines:



COSTS (if relevant)

AGENEX will assign one technician to provide support to the regional government during the entire implementation phase, 1 PM/year (30.000€/PM). The costs related to staff working from the public administrations will be covered as well with their own resources and the number of persons dedicated may vary, but is initially planned in 4 PM/year.

FUNDING SOURCES (if relevant):

The funding model that has been identified to finance this action consists of a mix of national and regional funding in approximately the following proportion:

40 % subsidized by the national Ministry for Public Works (Ministerio de Fomento)

60 % contributed by the Regional Government (Junta de Extremadura)

ACTION 3. Creation of a demand database in Extremadura and a management proposal, which will help the managing authority to decide about new projects implementation regarding construction of new social housing with high energy efficiency standards.

BACKGROUND

The need of including this action in the project's AP is clear, as it will be the tool and roadmap used by the managing authority to be able to make decisions about the implementation or not of new projects using ROP funds. It will also allow the regional government to know what kind of projects are necessary and where. As we were told in our visit to Croatia, it is not unusual that social housing are requested and time after that managing body finds out that they weren't really needed. This issue is a challenge but it could be better addressed if there were registration records with specific needs and socio-economic situation of the applicants. The identification of this issue and the misuse of available social housing in other regions inspired our managing authority to re-think the adjudication system established in Extremadura to make it as efficient as possible. The first step required is to have a clear knowledge of the current demand in the region; to achieve this, it is important to take into account, as seen in our visit to Tartu, the relevance of the participation of municipalities and the need of reaching an agreement between national, regional and local levels was highlighted.

Once the real need of social housing has been identified, a management proposal will be carried out, including the roadmap to improve the management of social housing in Extremadura. As previously mentioned, a good practice discussed during the project is the French system, in which social affairs develops annual revisions to state if changes in adjudication should be made, for instance: the need of a bigger/smaller house; a reduction or a raise in the rent paid by the tenants; or even the improvement of their situation and therefore they no longer need the social housing at all. These improvements in the management are specific for the housing owned publicly, but it will also be contemplated to improve the management when decided on new projects that will be privately owned.

ACTIONS TO BE IMPLEMENTED

The objective of this action is to implement changes in the management of the policy instrument based on the creation of tools and a roadmap to improve the managing system, influencing the decision making of new projects to implement more efficient social housing.

Currently, the demand existing in the region is not consolidated in one same database and the general management has a high potential to be improved. This is inefficient and hinders the whole process. To create the regional demand database, the following sub-actions will be developed:

For this action to be fully and properly implemented, the following sub-actions have been identified:

1. Gathering of information to create the social housing demand database.

To gather this information, it will be necessary to: communicate with the municipalities in the region and their town halls to know their needs; contact other stakeholders that could help identify demand; conduct surveys and centralize all of the data collected; define the requirements for the database; and extrapolate the outcomes at regional level to develop recommendations to the managing authority. Once it has been created, it will be given visibility.

2. Presentation of tools and a roadmap to the managing authority.

This activity will consist on presenting to the managing authority tools to be used for the implementation of new social housing projects with higher energy efficiency standards. As well as providing support for the use of these tools when deciding on new projects.

3. Proposal for an improved management system.

Considering the information gathered in previous steps and analysing the social housing demand and the stock available, as well as proposing the MA tools to be used for a better implementation of new projects, they will be provided with a proposal to better manage the existing stock and the provision of housing. This action will ensure to optimize the resources available.

EXPECTED OUTCOME

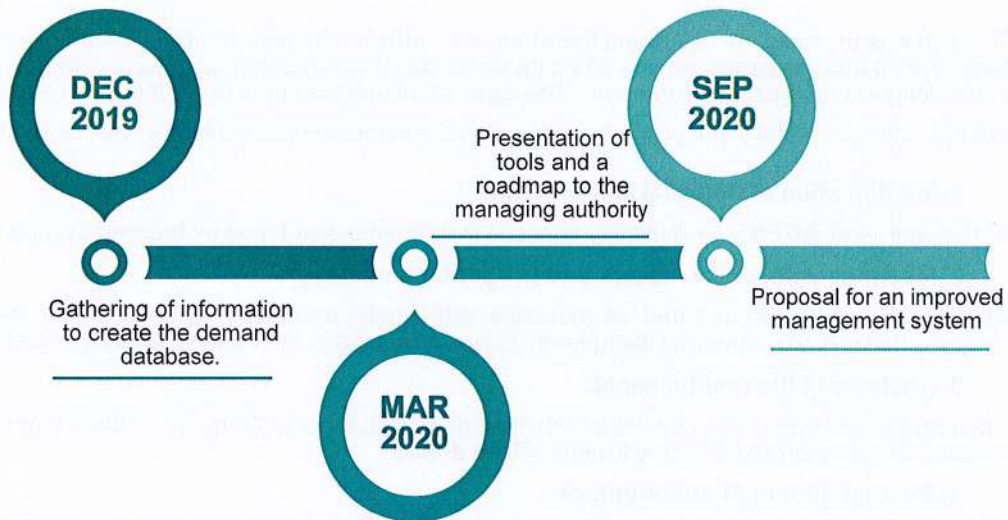
The main expected outcome of this action is to achieve a change in the management of the policy instrument regarding decisions for new project implementation and improving the current social housing management system.

PLAYERS INVOLVED

There are various players involved in the development of this action that has been set to create a demand database that will be used to better manage the adjudication system and the decision making regarding new projects. AGENEX, as project partner, will be the driving force. Secondly, and with a higher power of decision, the General Secretariat for Architecture and Housing under the Regional Ministry for Health and Social Policies. URVIPEXSA is the regional entity in charge of the protected housing and it belongs to this Ministry, they are key stakeholders in the project. The collaboration of the region's biggest cities' councils is also necessary to get to know the required data, as well as Badajoz's Municipal Real Estate Agency.

TIMEFRAME

The third action of the Action Plan for Extremadura on TOWARDS GREENING THE SOCIAL HOUSING SECTOR has the following activities and deadlines:



COSTS (if relevant)

The staff working from AGENEX and from the public administrations involved in the development of this action will do it at their own cost using their own resources.

FUNDING SOURCES (if relevant):

There are no specific funding resources needed to implement this action.

ACTION 4. Integration of the new Financial Instruments developed by Interreg Projects in the region into the funding schemes that the managing authority is using for new social housing construction and for retrofitting the existent ones.

BACKGROUND

Thanks to the exchange of experience and knowledge with other project partners, a main challenge has been identified in the project: it is the financial limitation. Most Operational Programmes have a specific budget for actions, but in the case of energy efficiency improvements that must be financed with the traditional grant system the budget doesn't go very far. This situation has found to be common among all partners in the Social Green Project, and considering the results AGENEX has obtained from other Interreg Europe projects (FIINERPOL) and the fact that the regional government is already familiar with financial instruments, the objective of this last action is to implement changes in the strategic focus of the policy instrument that will allow to provide funding lines for the owners of former social housing not only based on grants, but on FI where the risk is shared by the government.

ACTIONS TO BE IMPLEMENTED

This action is the most ambitious and therefore, the hardest to achieve before the end of the project. Bear in mind that this action will only affect those houses that are owned by private owners, not those that belong to the regional government. The steps identified to help achieve this are the following:

For this action to be fully and properly implemented, the following sub-actions have been identified:

1. Identification of financial instruments.

At regional level, AGENEX will identify financial instruments developed by Interreg Europe projects.

2. Meetings with policy makers and programme managers.

AGENEX will establish a series of meetings with public managers responsible for developing changes that will allow financial instruments to be introduced in the regional funding schemes.

3. Analysis of the requirements.

The requirements necessary for the introduction of new financial instruments in the regional funding scheme will be analyzed and conclusions will be drawn.

4. Presentation of FI opportunities.

After the preliminary study, the results explaining the financial instruments opportunities will be presented to the regional managing authority, as well as the requirements that should be met to introduce them.

5. Definition of a support strategy.

A support roadmap will be defined for intermediation with the responsible managers of the financial instruments for the integration in the regional funding scheme.

PLAYERS INVOLVED

There are several players involved in the development of this action: AGENEX will be in charge of the sub-actions related to the preliminary study, as well as responsible to presenting the information to the Regional Government, which is the second main player involved. Other public authorities will have to be involved as both County Councils and various City Councils. This action will also count on the presence of private players, such as banking and construction companies.

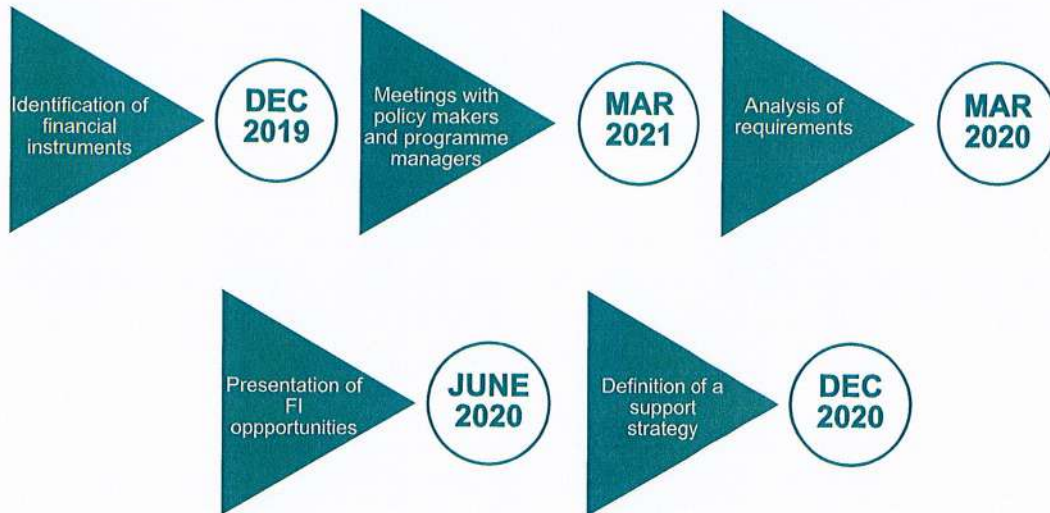
EXPECTED OUTCOME

The expected outcome of this action is to implement changes in the strategic focus of the policy instrument to be used in the implementation of new projects regarding the construction of new social housing and the retrofitting of the existing one.

This action will allow making the most of the regional budget available by increasing the use of financial instruments as opposed to the traditional grant system.

TIMEFRAME

The second action of the Action Plan for Extremadura TOWARDS GREENING THE SOCIAL HOUSING SECTOR has the following activities and deadlines:



COSTS (if relevant)

The staff working from AGENEX and from the regional government in the development of this action will do it at their own cost using their own resources.

FUNDING SOURCES (if relevant):

The priority investment 4.3.1, which has three axes of intervention, has 33M € allocated; it still isn't certain which amount will be located in social housing. Representatives from the regional government have confirmed that Junta de Extremadura has 4M € from their own budget to address new projects in social housing.

This Action Plan has been designed by Extremadura Energy Agency (AGENEX). The foreseen actions in it will be carried out with the coordination of the Directorate General for Architecture of Junta de Extremadura.

<p>The partner responsible for drafting the SOCIAL GREEN regional action plan for Extremadura Region</p> <p>08874086L COSME PEDRO SEGADOR (R: G06358105)</p> <p>Firmado digitalmente por 08874086L COSME PEDRO SEGADOR (R: G06358105) Fecha: 2019.05.22 14:41:34 +02'00'</p> <p>Signature: Mr. Cosme Segador, Director</p> <p>AGENEX – Extremadura Energy Agency agencia extremeña de la energía C.I.F: G-06358105</p>	<p>Managing Authority of the Regional Operational Program of Extremadura 2014 – 2020 acknowledging and validating the current action plan</p> <p>Signature: Mrs. María Ángeles López Amado, Director</p> <p>Directorate General for Architecture - Regional Government of Extremadura</p> <p>Date:</p>
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