



**Auvergne  
Rhône-Alpes**  
Énergie Environnement



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## Feedback from the regional conference

### « Pooling of resources for the energy renovation of public buildings, at different territorial levels »

Organized by AURA-EE at DREAL Auvergne-Rhône-Alpes

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As part of the European STEPPING project on energy performance contracts (EPC), AURA-EE organized on 27 February 2018, with the support of Europe, the Regional council and the ADEME, and in partnership with DREAL, **a conference / workshop on the pooling of resources for the energy renovation of public buildings.**

The questions asked collectively were: What are the existing tools? What kinds of approaches are possible and at what territorial level?

Feedback from work in progress in different territories has made it possible to share the challenges and the technical, legal and financial approaches of pooling to multiply the energy renovation of the public service buildings of the Auvergne-Rhône-Alpes territorial authorities.

*The following structures have shared their experiences in pooling resources for the energy renovation of public buildings, at different territorial levels.*

With the support of :



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## AT THE REGIONAL LEVEL

**SPL OSER**, a regional energy services operator, is responsible for carrying out efficient energy renovation projects on the heritage building of its shareholder authorities. **It manages projects centrally**, from decision support to commissioning, to contracting, operations and operations management. 18 EPCs have been signed by the SPL OSER for its shareholders since its first steps in 2013, 115,000 m<sup>2</sup> of buildings have been renovated and 60 M € of works committed. The limit of this arrangement is related to the size of the projects (> 1 M €) and to the number of shareholders which is restricted to a few dozens.

**Operene** is a commercial structure, located in Auvergne-Rhône-Alpes, which has been designed to **help SMEs organize and work together to offer a comprehensive approach** to housing renovation. Operene has developed a regional network of some forty construction companies, in all trades. 12 renovation projects have been completed so far: 3,500 housing units have been supported in 5 different economic areas. Operene enables SMEs to respond to renovation tenants, in particular to EPCs, in the form of groupings.

## AT THE COUNTY LEVEL

**The SIEL** (Intercommunal Energy Association of the Loire Department) presented its action in support of the energy renovation of its member municipalities. **The shared service of assistance to the energy management of the patrimony (SAGE)** that it proposes at the *Département* level allows the carrying out of actions and works of improvement of the energy performance of the Loire municipalities. In addition, an assistance service on EPCs has been developed and launched 5 EPCs with good results. Three examples of energy performance contracts implemented in this context by the SIEL that have achieved the desired performance objectives were presented.

## AT THE TERRITORIAL LEVEL

In 2017, the **EPCI of Arlysère** (public inter-municipal cooperation establishment) worked **to implement a patrimony renovation strategy, integrating the buildings of 36 municipalities in its positive energy territory (TEPOS)**. Energy audits were carried out on the 32 most energy-consuming buildings, representing € 270,000 in energy consumption per year. Different scenarios have been studied for their renovation: an "at a minimum" plan (replacement of systems and implementation of operating contracts), an ambitious "factor 4" plan, but also cross-cutting approaches, such as a renovation plan for schools (mutualization by type of building), a lighting renovation plan, or a wood heating deployment plan (mutualization by use). The main difficulty encountered at the moment is to motivate the municipalities to start energy performant works, the question of funding often returning in the discussions, as a barrier to action.

**Nord-Isère Durable**, also TEPOS, presented its approach, **which aims to bring initiatives for energy transition closer** to the territory of CAPI and the Community of communes of Vals du Dauphiné. Its objective is to support and develop sustainable construction on the territory. Several tools have been put in place: the shared energy council (CEP and CEP +) and the AMO (Assistance to the contracting authority) Nord-Isère-Durable, and actions are ongoing in the frame of the STEPPING project and the Caisse des Dépôts AMI (Call for expression of interest) "Energy renovation of the built heritage of territorial authorities". Energy audit campaigns have been conducted, legal studies of the various possible solutions are in progress (energy performance markets, SPL set up, "intracting" or SEMOP – single operating semi-public company), and a work program is being defined (in batches of work).

*Thus, solutions are already available to municipalities end EPCIs to move forward in the renovation of their built heritage, but approaches and complementary tools, including legal and financial, must be deployed to multiply projects, throughout the region.*

**Different legal arrangements are possible.** AURA-EE, in the framework of the European projects STEPPING and PEACE\_Alps, and works financed by the regional Council and the ADEME, studied, in 2017, the feasibility of different models: 1 / the EPCI as pilot of a patrimony renovation plan, 2 / the grouping of orders between municipalities, 3 / the development of SPL, GIP (public interest group) and / or SEM (semi-public company). These arrangements are possible to pool the missions of assistance to contracting authorities, contracting and execution of contracts. On the other hand, regarding the issue of third-party financing, only public-private partnerships combined to SPL / GIP / SEM type schemes are possible, but on large projects (< 2 M€), for profitability reasons. For smaller projects, the solution is a bank loan.

Vesta Conseil Finance, which has worked in the territory of Arlysère, shows that the financing of projects solely by energy savings is not viable in most cases. It is therefore a global desire for patrimony renovation that should encourage communities to invest. **The use of loans, partly reimbursed by energy savings, makes it possible to finance a large proportion of projects.** Regarding the question of pooling financing, whatever the model chosen, in the end, each building owner will have to pay for the renovation work on his buildings, with different levels of profitability.

**The ADEME, to conclude the afternoon, underlined that it is by combining tools and models that we will be able to multiply the projects** of energy renovation of the buildings, notably thanks to projects like STEPPING, which focus on finding solutions for small municipalities. The new National "Building renovation Plan", to be presented by the Minister end of March, should incorporate accompanying measures to speed up public buildings energy renovation, through new financial solutions. In addition, the following actions should be helpful to meet our targets: encourage the implementation of multi-year investment patrimony strategies (support for assistance and engineering), develop regular and in-depth exchanges on the sharing of experiences (such as regional conferences organized on EPC, energy savings ...), have a real "Project" toolbox (model contracts, specifications, preliminary studies, clause lists ...) through a national resource website, continue to develop "field tools", such as the shared energy council, or innovative initiatives, such as "intracting".

*The actions undertaken by the territories in the analysis of their built heritage (monitoring of consumption and knowledge of buildings through the CEP, energy audit campaigns, cross-cutting analyzes by type of building or use, setting up shared tools such as operating contracts, EPCs ...) should be encouraged and capitalized. They will be necessary for the deployment of projects, in particular within the framework of the new national building renovation plan mentioned by the ADEME in conclusion, which will give us the means to boost EPC and the pooling of resources.*