EU PEERS

Community for Integrated Home Renovation Services

Inside the One-Stop Shop models: Findings from 57 OSS across the EU

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Introduction

This report presents the findings of an online survey conducted among 57 One-Stop Shops (OSS) for residential energy renovation and 19 support structures across multiple EU countries. The list of respondents is accessible in section 5, at the end of the report. For comparison, the author estimated that more than 200 OSS operates at the moment in the EU.

This report summarizes an analytical study on One-Stop-Shops. It brings evidence on how they operate and their impact on the renovation market. It is not about mapping all One-Stop-Shops but rather to **show, particularly to policymakers, how some OSS function and their impact.** This report is not exhaustive and only reflects the responses provided by the 57 OSS and 19 support structures.

The survey has been open from September to December 2024, using the web-based platform 'TypeForm' to collect responses. The survey has been widely promoted on the EU Peers website, on social media, through various digital communications and via email. Direct emails proved to be the most successful way to engage individuals and collect responses. The questions have also been translated in Italian and Spanish (via a separate PDF document publicly accessible).

The survey contained two sections: (1) general information (legal status, revenue streams, costs of operation, etc.) and (2) performance and impact-related data (number of energy audits, average journey duration, etc.). All questions, from section one, were mandatory while questions from section two were optional. When responding to the survey, respondents agreed the following: "The provided data will be used for the sole purpose of the EU Peers project. Data will be aggregated and anonymised."

Given the **wide variety of OSS within respondents, the analysis clusters**, when relevant, **responses in sub-groups, using several categories** such as **the targeted energy savings, services models or legal status.** These sub-groups are displayed when several data are correlated to make the analysis more accurate and go beyond the overall average.

Among the 97 submissions, 13 responses are ineligible (not OSS nor IHRS supporters). Several organisation duplicates were also identified. In total, **76 unique responses (57 OSS & 19 support structures)** have been used for the analysis.

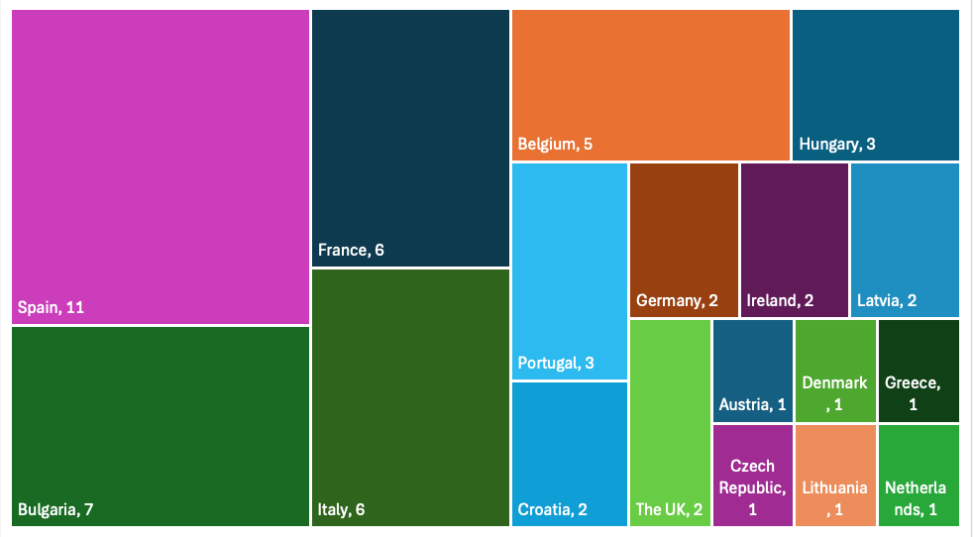

Figure 1 – Distribution of surveyed OSS across the EU

A total of **57 One-Stop Shops (OSS)** actively participated in the survey[1], providing comprehensive insights into their operations. The geographical distribution of responses was diverse, with notable concentrations in certain countries. Specifically, Spain contributed the highest number of responses, totalling 11, followed by Bulgaria with 7, France and Italy with 6 each, and other countries providing between 1 to 5 responses each.

The survey also gathered responses from **19 support structures**, with the highest participation coming from Hungary (5 responses), followed by the Netherlands (3 responses), Belgium and Portugal (2 responses each). The remaining responses were received from various other European countries.

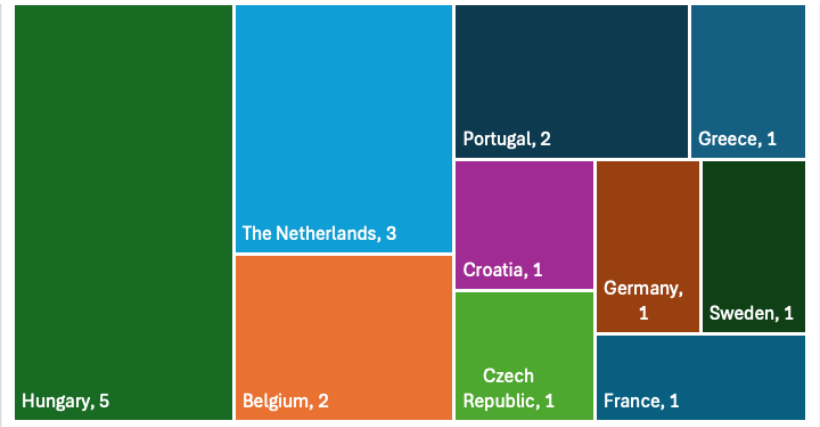

Figure 2 - Distribution of surveyed support structures across the EU

[1] Disclaimer: the information presented in this report is based on the responses collected via the survey and reflects the perspectives of the respondents. While efforts were made to ensure accuracy, some responses may contain inaccuracies or reflect varying interpretations of the questions. As a result, the findings should not be considered a definitive representation of One-Stop Shops in the EU.

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Glossary

- **IHRS**: Integrated Home Renovation Services – umbrella term for entities offering integrated home renovation services with the intention of simplifying the renovation process for homeowners. The term IHRS appeared prominently in specific EU funding calls such as the LIFE programme. IHRS is described as a coordinated, integrated service bundle guiding homeowners through the entire renovation process, including advisory, design, financing, contractor coordination and quality control.
- **OSS**: One-Stop Shop is a technical assistance facility offering integrated, transparent and accessible advisory and support services related to the energy performance of buildings. OSS were introduced in the recast Energy Performance of Buildings Directive (EPBD, EU/2024/1275) and mandate Member State to establish one OSS per 80,000 inhabitants.
- **All levels of energy saving** refers to renovations ranging from minor upgrades to major deep renovations, without targeting a specific energy-saving threshold.
- **Renovation with significant energy savings** refers to partial renovations aiming for <60% energy savings.
- **Deep renovation**: in EPBD recasts related to the Renovation Wave and Nearly Zero-Energy Buildings targets, “deep renovation” is interpreted as achieving a minimum 60% reduction in primary energy use.
- **EU funds**: EU funds – includes LIFE, ELENA, Horizon Europe, and other EU funding mechanism
- **Conversion rate**: percentage of users/clients moving from one stage of service to the next (e.g. advice -> audits -> renovation)
- **FTE:** Full-Time Equivalents
- **Municipal/regional company**: local or regional energy agency or another public entity set-up by local or regional authorities and their groupings.
- **Public-private partnerships**: public-private refers to joint initiatives between public bodies and private sector actors

1. Analytical overview of One-Stop Shops

1.1. Geographical & population coverage

Nearly half of the respondents (49.1%) operate at the **regional level**, providing services across broad territories that often encompass multiple municipalities. A smaller proportion (24.6%) focus their activities **exclusively at the local level**, targeting specific municipalities. A minority of OSS report **nationwide operations** (10.5%), while a few operate across multiple geographical levels, combining local, regional, and national reach. **The majority of surveyed OSS operate at regional levels**. Only a minority operate nationally or cover multiple levels simultaneously.

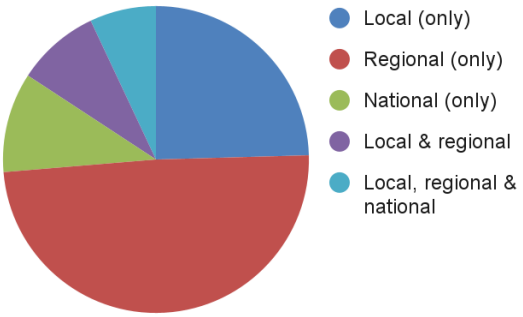

Figure 3 - Distribution of geographical coverage across respondents

This geographical spread is also reflected in the population coverage. To ensure the accuracy of the analysis, responses from national-level OSS were isolated, as their large-scale operations could have distorted the figures (five organisations reported operating at national level, thereby covering their entire respective countries - the UK, Spain, the Netherlands, Hungary and Czech Republic). The remaining data reveals significant variation, with OSS covering populations ranging from **30,000 inhabitants to over 6 million**. On average, **local OSS serve approximately 1.1 million people**, while **regional OSS reach an average of 1.7 million inhabitants**. Population coverage varies widely, reflecting diverse local housing markets. However, even local OSS often even significant populations.

1.2. Timeline of OSS establishment

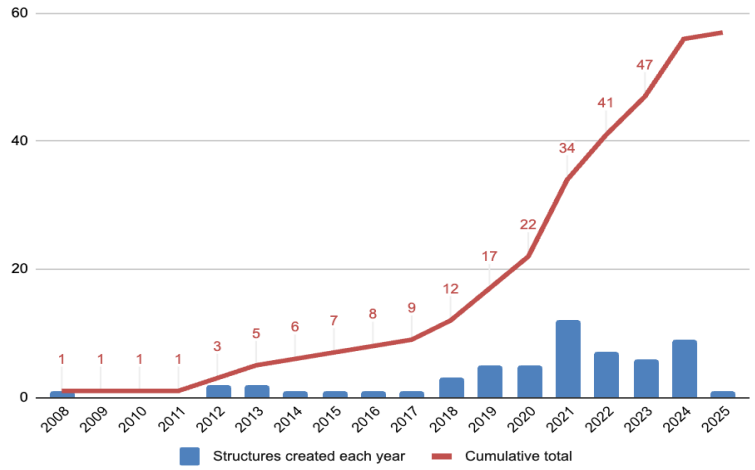

Figure 4 – OSS establishment timeline (yearly creation and cumulative creation)

The growth of OSS has accelerated rapidly in recent years. Prior to 2010, only one respondent OSS was established. Between 2010 and 2019, a modest increase occurred, with 16 new OSS founded. However, since 2020, the sector has expanded rapidly, with **40 OSS created in just a few years**. This surge illustrates the increasing recognition of OSS as essential instruments for facilitating residential energy renovations. OSS development is a relatively recent but rapidly growing phenomenon, especially after 2020, likely triggered by EU policy, funding programs, and a growing public interest in energy renovation.

1.3. Targeted building types

Individual housing/single-family homes remain the dominant focus, covered by 87,7% of OSS. Among this category, 12.2% provide services **ONLY** to individual housing/single-family homes.

Multi-family housing/condominiums are the focus of 82,4% of surveyed OSS. Among this category, 4 OSS (7%) provide services **ONLY** to multi-family housing/condominiums.

22,8% (13 out of 57) provide services to social/public housing. Among this category, no OSS provides services ONLY to this type of building.

19.2% (11 out of 57) provide services to a mix of residential and tertiary sector buildings. Among this category, 2 OSS provide services ONLY to residential and tertiary sector buildings.

Many OSS serve multiple building types simultaneously. Nearly half (49.1%) cover both individual and multi-family housing, while smaller shares target more complex combinations, including social, public, and tertiary sectors. Surveyed OSS primarily design owner-occupied private housing, while fewer target public or mixed-used buildings.

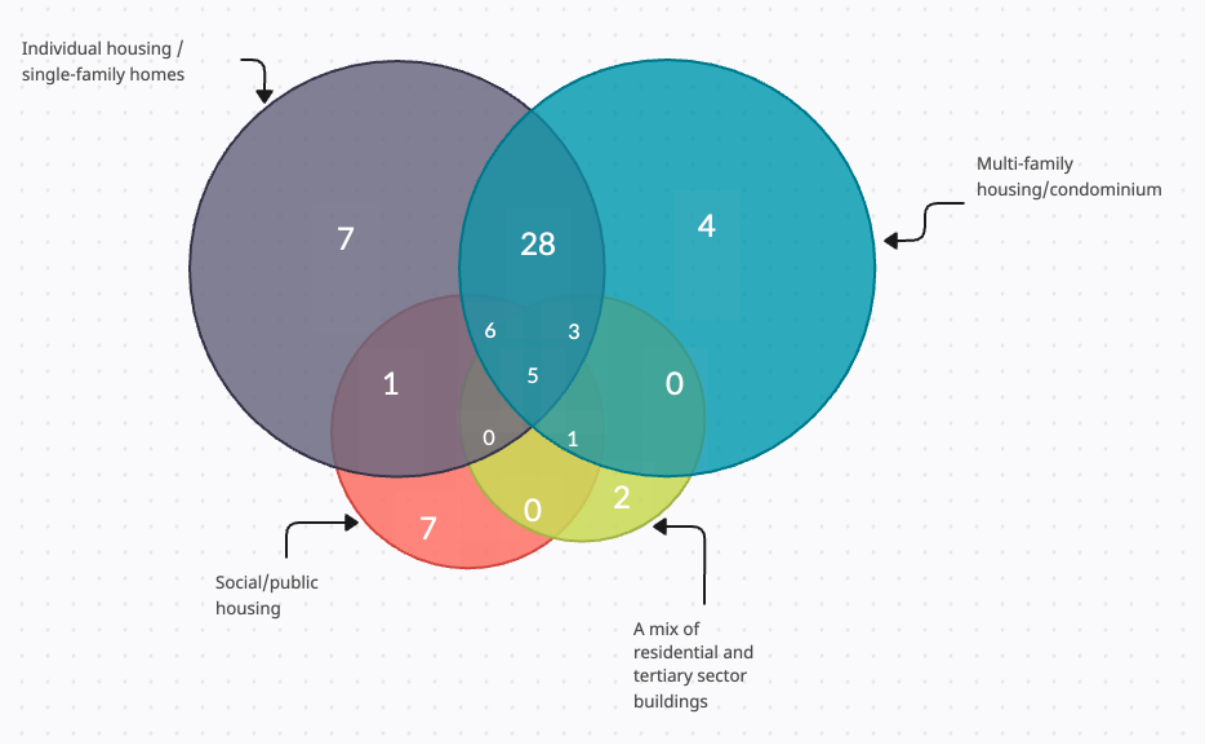

Figure 5 – Venn diagram: targeted building types and associated overlaps

1.4. Legal status & governance models

The legal structure of One-Stop Shops varies significantly, with the following distribution observed among respondents:

- A significant proportion, 33.3%, of the OSS operate as **not-for-profit organisations**, including energy agencies (*some local and regional energy agencies reported to be non-profit associations, while they would have fallen under the municipal/regional companies*), associations, citizen-led cooperatives, and social enterprises. In most cases, public authorities (local and/or regional authorities) are involved in this type of OSS.
- **Private companies** make up 22.8% of the surveyed OSS.
- **Municipal or regional companies**, typically affiliated with local or regional energy agencies, represent 17.5% of the respondents.
- **Public organisation**s, which are directly integrated into city or regional administrations, account for 15.8% of OSS.
- **Public-private partnerships** constitute 7% of OSS.
- A small fraction of 3.532% consists of **other legal structures**, including emerging OSS that currently lack formal legal recognition.

Overall, public administrations are involved in nearly 74% of surveyed OSS, showing their great involvement in the setting-up and running of OSS. Public sector leadership dominates OSS models, ensuring accessibility and neutrality. However, hybrid and private models are increasingly contributing to more complex projects, particularly for deep retrofits.

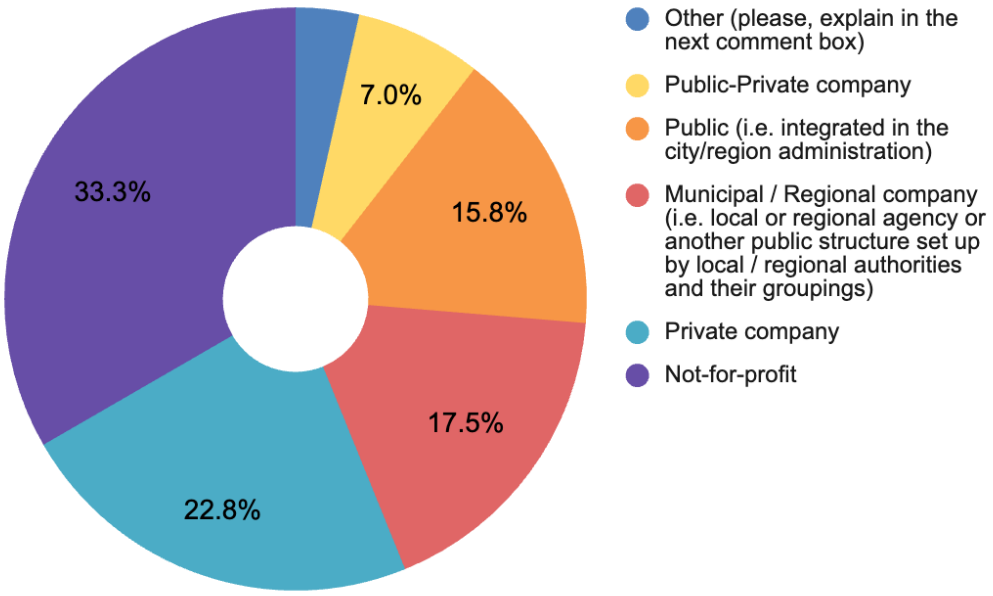

Figure 6 – Distribution of legal status across respondents

1.5. Correlation with the level of targeted energy savings

As outlined earlier, the distribution of results is distributed in sub-groups when relevant, particularly when correlating several figures. In this case, the legal status is correlated with the level of targeted energy savings reported by OSS.

The following graph presents the distribution of targeted energy savings across different OSS legal structures. Out of the 10 structures falling into the municipal/regional companies, 8 (80%) focus on all energy savings levels (meaning they support a range of renovation depths, from light improvements to deep retrofits). Only 2 reported to focus on deep renovations (major, ambitious deep retrofits). Conversely, 50% of public-private companies reported to focus on deep energy renovations.

The type of governance structure appears to influence the OSS' focus. Public OSS are primarily designed to offer inclusive support across all renovation types, while public-private entities show a higher focus in deep renovations.

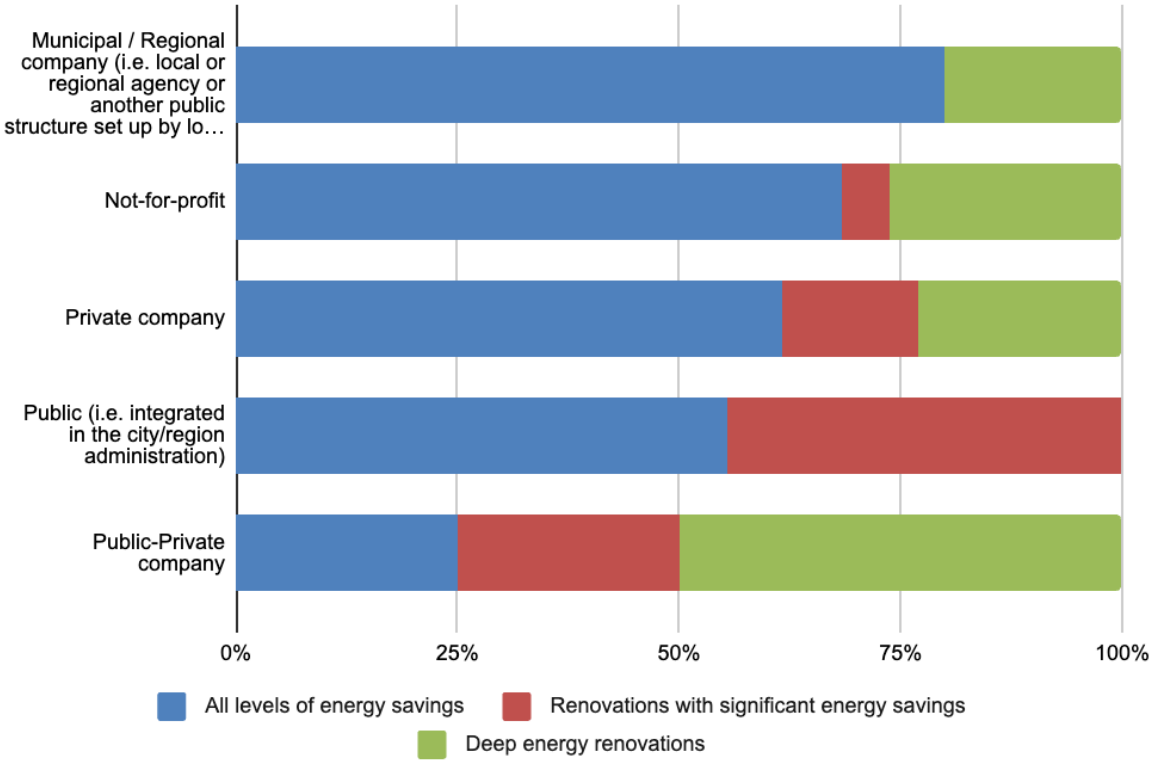

Figure 7 – Targeted energy saving level across OSS legal status

1.6. Correlation with service models (free vs. paid services)

The business model of OSS correlated closely with their legal status. Analysis revealed that 80% of municipal or regional companies provide their services free of charge, while 80% of public-private companies operate on a fee-based model, partially covering their operational costs through client payments.

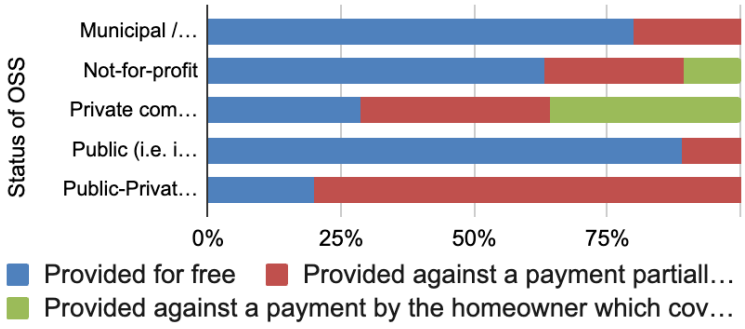

Figure 8 – Distribution of service models across legal status

In addition, ⅓ of private companies provide their services against a fee covering their entire costs. Municipal/regional companies, public bodies (integrated in city/regional administrations and not-for-profit organisations are more likely to provide free services.

Municipal/regional companies, public organisations and not-for-profits are more likely to offer free services compared to private entities.

1.7. Involvement in renovation works

To the question, “does your OSS carry out the renovation work and/or hire construction companies to do it?”, more than 60% of private companies responded “yes”. In contrast, only 50% of public-private companies and a mere 11% of municipal or regional companies reported involvement in direct renovation activities. Private and hybrid OSS are more operationally involved in renovation execution, while public-led OSS focus more on guidance, coordination and project facilitation.

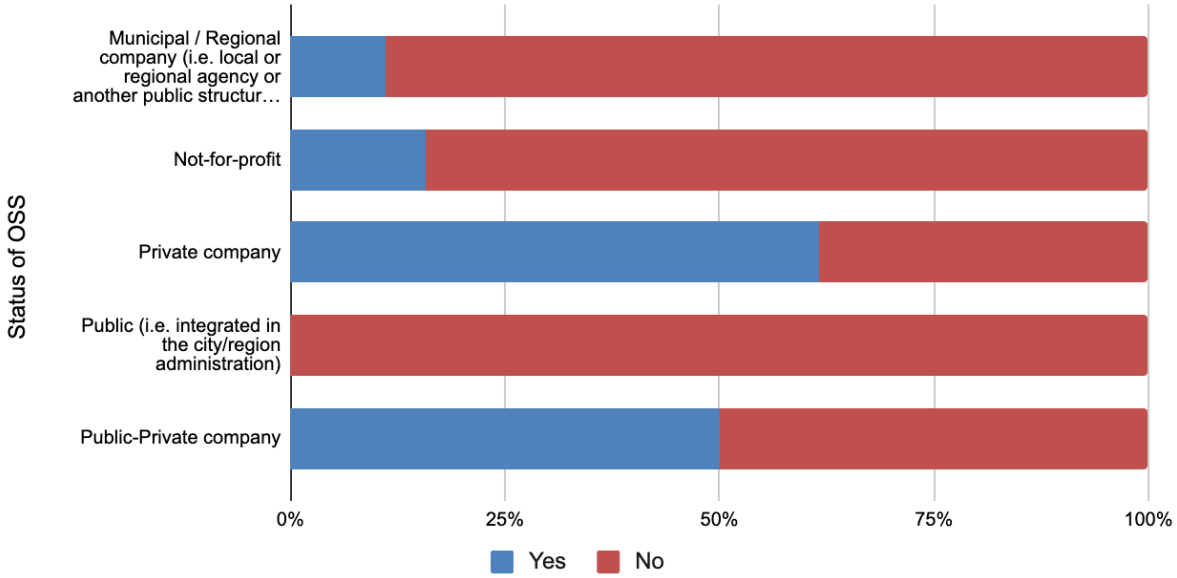

Figure 9 – Distribution of OSS involved in renovation works across legal status

1.8. Correlation with income sources

- **Private companies: mixed revenue model**
  Private OSS show a balanced dependency between EU funds and direct client fees. This indicates a strategy where private companies leverage EU grants while maintaining commercial viability by charging for their services.
- **Public-private companies: diversified funding streams**
  Public-private OSS show the broadest range of financial support, relying on EU funds, private investments and services fees. It is interesting to note that OSS falling under this category do not charge fees to suppliers such as private companies.
- **Municipal/regional companies: dependence on local subsidies**
  For municipal and regional OSS, local government subsidies are the primary funding source, closely followed by EU funds.
- **Public organisations (Integrated in public administration): Similar to Municipal/Regional Companies**
  Public OSS embedded within city or regional administrations follow a similar pattern, with one-third of them primarily relying on local subsidies.

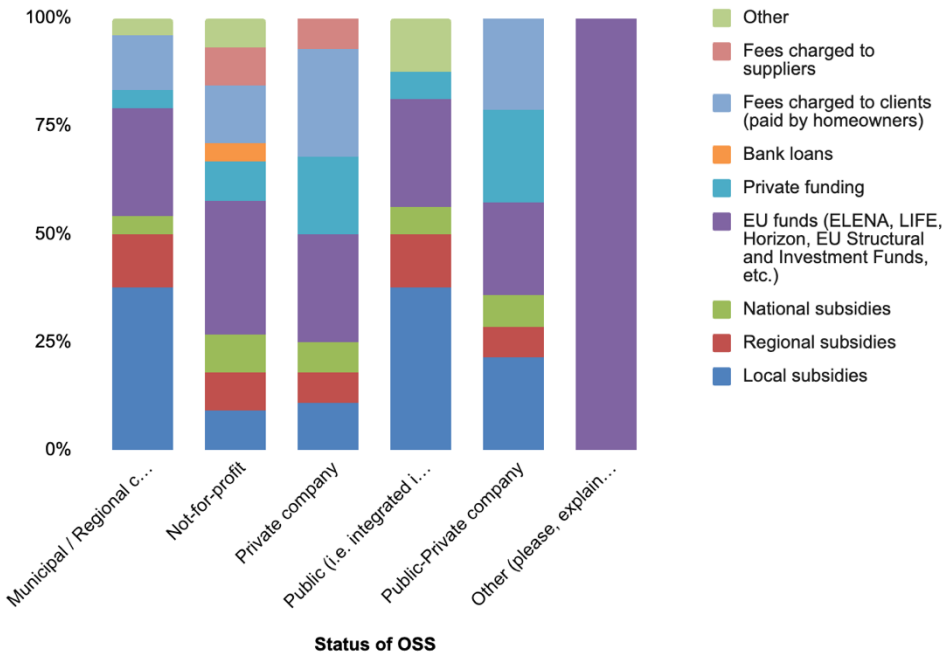

Figure 10 – Distribution of income sources across legal status

Overall, the share of public money represents around ¾ of public-led OSS' budget (municipal/regional company, integrated in public administration), while it represents half of non-profit, private company and public-private companies OSS' budget.

Funding streams align with institutional structures. Public bodies remain subsidy-dependent, while private and hybrid actors diversify funding to ensure financial sustainability.

1.9. Targeted energy saving levels

1.9.1. Distribution of targeted energy saving levels across OSS

64.9% of respondents reported to target all levels of energy savings, against 21.1% only for deep renovations and 14% with renovations with significant energy savings.

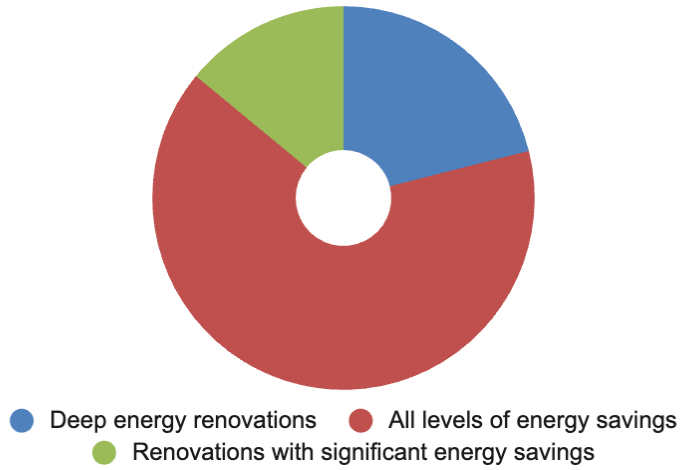

Figure 11 – Distribution of targeted energy saving levels across surveyed OSS

1.9.2. Distribution of targeted energy savings levels across service models

The graph below provides insights on the distribution of targeted energy saving levels across service models.

- **Deep energy renovations** (12 OSS in total): only 2 OSS provide their services for free, while 9 OSS (75%) were provided with partial homeowner payment and 2 OSS (16,7%) with renovations fully paid by homeowners.
- **All levels of energy savings:** a significant majority of structures (26 OSS - 70.3%) are providing their services for free. 5 cases each require partial payment or full payment by homeowners.
- **Renovation with significant energy savings:** 75% of respondents (6 structures) reported to provide their services for free while 25% structures involved partial payment.

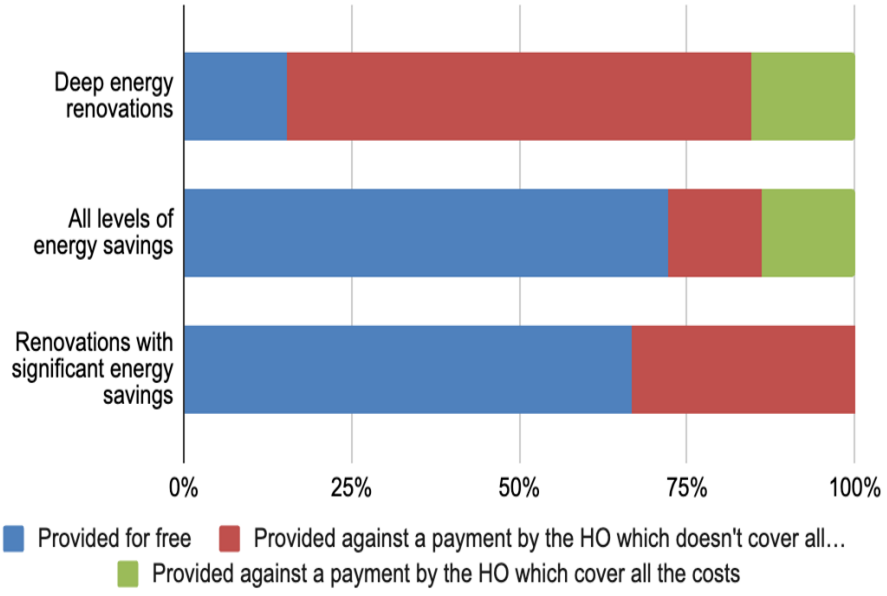

Figure 12 – Distribution of targeted energy saving levels across service models

Free services are most common for OSS, particularly the ones focusing on all levels of energy savings and with significant energy savings. Deep renovations are mainly funded through partial homeowner payment rather than being fully subsidized or entirely paid by homeowners.

1.10. Correlation with geographical scope

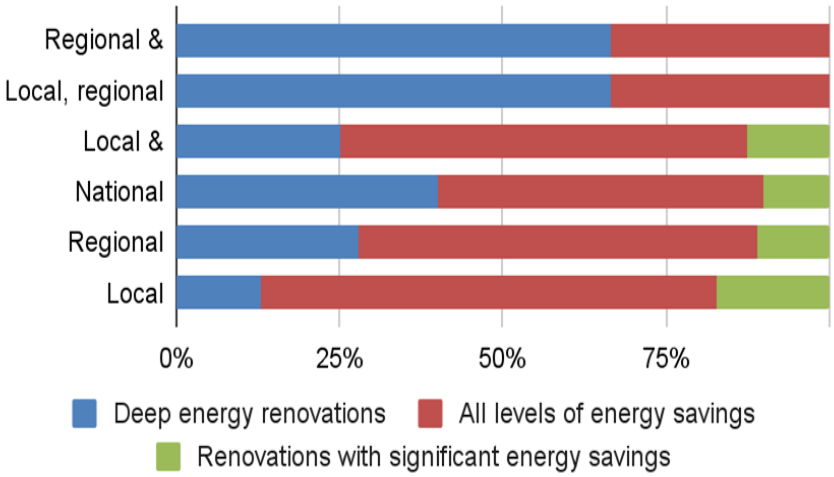

Figure 13 – Distribution of target energy saving levels across geographical coverage

The figure above reveals that OSS operating across multiple levels (regional & national and local, regional & national) tend to focus more on deep renovations, while regional and to a larger extent local OSS tend to focus more on all levels of energy savings. **OSS with broader or multi-level scope tend to pursue more ambitious renovation goals, suggesting that local markets are not yet mature for deep renovations and that there is not enough demand at a smaller scale for deep renovations.**

1.11. Correlation with the provision of financing options

The graph below presents the distribution of OSS according to the targeted energy saving level and whether direct financing is available (YES) or not (NO). This correlation helps us determine if OSS offering financing options are associated with higher energy savings. According to the data:

- **For OSS targeting deep energy renovations:**
  - 58.3% of OSS provide direct financing against 41.7% that do not provide direct financing.
- **For OSS targeting all levels of energy savings:**
  - 10.8% of OSS provide direct financing, while 89.2% do not provide direct financing.
- **For OSS targeting renovations with significant energy savings:**
  - 25% of OSS provide direct financing, while 75% do not provide direct financing.

Most OSS do not provide direct financing, especially the ones targeting all levels of energy savings. On the other hand, OSS targeting deep renovations are more likely to provide direct financing to

their clients. **Direct financing is somehow linked to deep renovation projects, confirming that financial support mechanisms are key to enabling ambitious retrofit projects.**

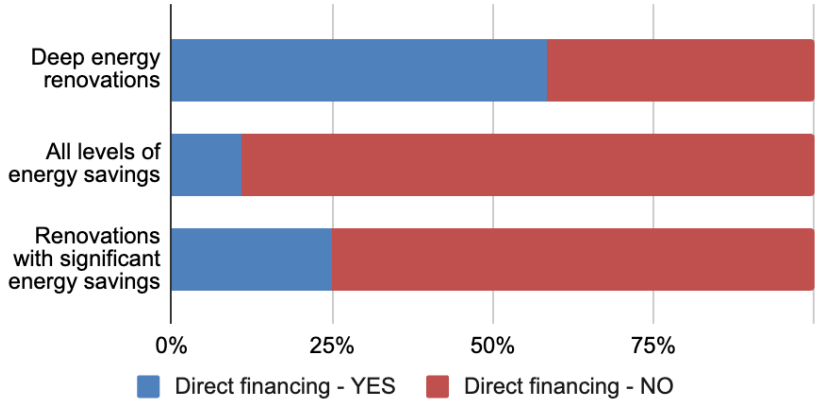

Figure 14 – Distribution of targeted energy saving levels across financing options

1.12. Commercial and competition aspects

1.12.1. Positioning within or outside the competitive sector

The OSS ecosystem ranges from public, neutral service provision to more market-oriented activities. 42% of surveyed OSS indicated to fall within the competitive sector, at least for part of their services. This suggests that around 4 OSS out of 10 engage in market-driven activities, possibly offering fee-based services or competing with private sector providers in certain aspects. 58% of surveyed OSS reported they remain fully outside the competitive sector, positioning themselves as neutral, non-commercial actors. The split between OSS engaging in competitive markets and those staying neutral is relatively balanced.

1.12.2. Distribution of OSS across pricing models providing free services

- **Provision of free services**

Around **60% of surveyed OSS reported to provide their services for free.** Among this category, only 8% also provide some services against a payment by the homeowner which doesn't cover all the costs. There are no cases where OSS with free services also provides paid services fully paid by clients for part of their activities.

- **Provision of services against a payment covering part of the costs**

28% involve services where homeowners pay a fee that does not fully cover costs. Among this category, 18% of surveyed OSS also offer some free services. The fee typically includes general and tailored advice, feasibility studies, selecting contractors, technical assistance during the project and monitoring the technical implementation and savings.

- **Provision of services against a payment covering the entire costs**

12% rely only on payments from homeowners covering their entire costs.

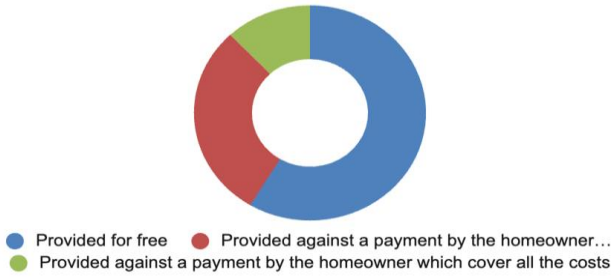

Figure 15 – Distribution of OSS across service models (free vs paid services)

1.13. Correlation with primary source of income

- There is a **notable reliance on EU funds for the three different models**. This is, of course, affected by the fact that respondents are primarily connected to EU projects.
- OSS providing free services tend to have a wider variety of primary source of income, compared to fee-based OSS, with 38.7% of surveyed OSS relying primarily on EU funds, 25.8% on local subsidies, 16.1% for regional subsidies and respectively 9.7% for private funding and others.

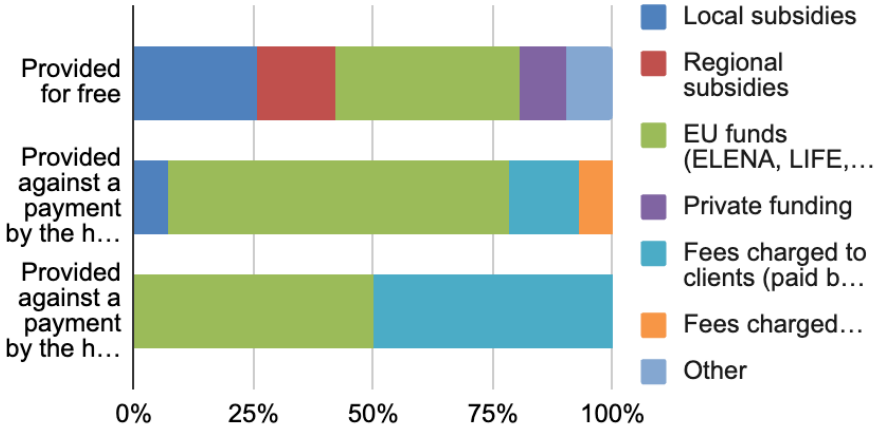

Figure 16 – Distribution of primary source of income across service models

1.14. Costs of the service paid by homeowners

Surveyed OSS listed three main levels of paid services provided to their clients. Among each level, pricing models differ:

- **Energy audit**: these audits assess the energy efficiency of a home, often as a first step before renovation. Prices vary significantly:
  - Lowest price: €200
  - Common range: €480 - €500 (standard cost for a basic audit)
  - Highest price: €1,200 - €1,860 (higher-end audits with additional services)
  - Some services charge per hour (e.g. €62/hour)

- **Technical design and specifications**: some OSS offer more detailed planning, specifications and consultations services:
    - Fixed cost per m2: between €3 to €5/m2 for technical design
    - Hourly fees for consultation: between €5 and €6/hour for legal or financial diagnosis

- **Full renovation support and project management:** this includes managing renovation contracts, advisory services, and overseeing works
    - Fixed-rate full renovation support: between €2,690 and €10,000. A private company charges €6,500 per flat for example.
    - Percentage-based pricing: 8% of the renovation works. Variable percentage-based cost depending on the total renovation price. There is one case where the fee waived if the renovation is done by an affiliated company
    - Tailored pricing: custom pricing depending on building type and service.

It should be noted that large varieties exist when it comes to the costs paid by clients/homeowners, depending on the country and thus the customers'/homeowners' financial possibilities.

Pricing models used by OSS. There are three primary pricing strategies used:
- **Fixed rates**: used for predictable costs like audits, legal consultations and technical design.
- **Variable pricing**: per square meter, per hour, or per flat. It helps scale pricing to project size and complexity.
- **Percentage-based pricing**: often used for comprehensive project management services.

The pricing models identified in this study are comparable to the ones identified in the report "One-Stop-Shops for residential building energy renovation in the EU" by Benigna Boza-Kiss and al. (2021)[2]. In their report, the authors identified three categories: fixed price, variable price or prices linked to the overall project volume.

According to this study "**simple OSS services** (feasibility study or tailored advice only) cost around **100-550 EUR/project** and typically all or up to 80% of this cost is covered by the OSS, **light services** (tailored advice, quotes section, monitoring, technical support) cost around **1000-2000 EUR/project**, of which 50-70% is paid from the OSS budget, and the customer only pays less than 50% of all costs. In case of **full service,** the total costs reach up to **3000-6000 EUR/project**, and 50-70% are paid by the customers, while the remaining 30-50% are settled from subsidies."

1.15. Source of income

- On average, respondents rely on **2.3 sources of income for their OSS**.
- **Almost half of the surveyed OSS (46.2%) rely primarily on European Union funds as their main source of revenue**.
- Local government subsidies are the main financial support to 17.3% of the respondents.
- Fees charged to homeowners contribute to the main income of 11.5% of OSS.

[2] https://publications.jrc.ec.europa.eu/repository/handle/JRC125380

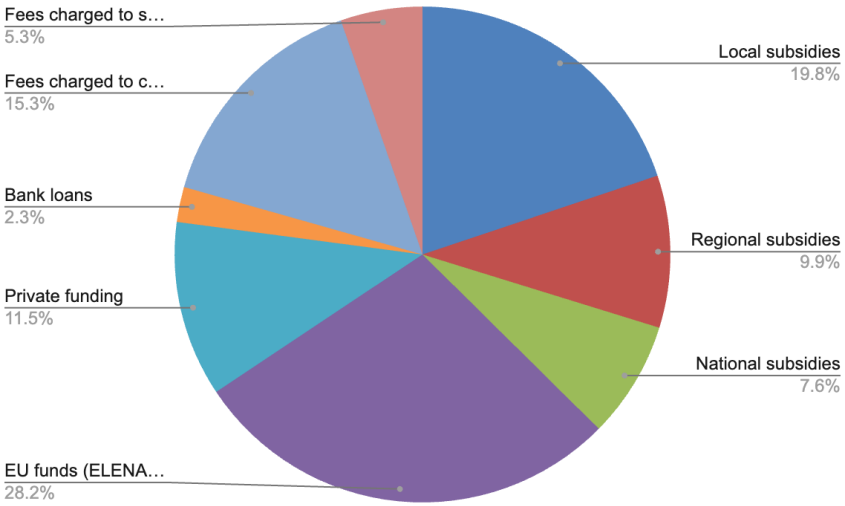

Figure 17 – Overall distribution of all income sources across surveyed OSS

Surveyed OSS were requested to provide the different revenue streams for their organisation in 2023. They could choose as many revenue streams as they want. The figure above displays the overall distribution of income sources across all OSS. **EU funds is the most cited revenue stream, followed by local subsidies and fees charged to clients**.

Surveyed OSS were then requested to identify the primary source of revenue. The figure 16 displays the distribution of primary source of income. **EU funds remain on top and represent more than half of the primary source of income for surveyed** OSS. Local subsidies and fees charged to clients remain on the podium but with a lower proportion. Compared to the overall distribution of all income sources, regional subsidies, apart from EU funds, is the only other source of income with a (slight) increase when looking at primary sources.

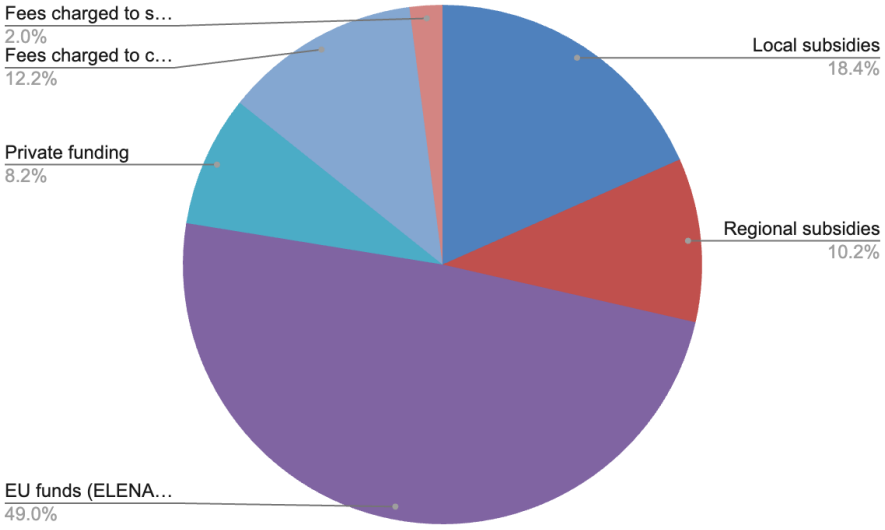

Figure 18 – Distribution of the primary source of income across surveyed OSS

1.16. Correlation with legal status

The figure below shows the distribution of the primary source of income across the surveyed OSS' legal status. As indicated above, the predominant source of income are EU funds. When looking at the different legal status, municipal/regional companies rely mostly on local subsidies while private/public-private companies rely primarily on EU funds and to a minor extent on fees charged to clients. Public OSS tend to also have a diversified primary source of income.

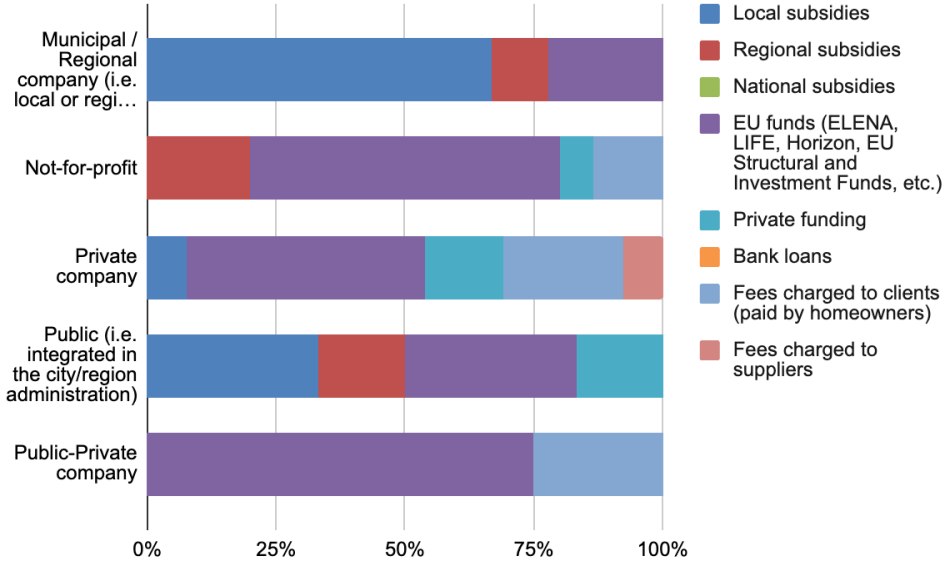

Figure 19 – Distribution of primary source of income across legal status

1.17. Correlation with targeted energy saving levels

OSS targeting deep energy renovations rely primarily on EU funds for their operation while OSS targeting all levels of energy savings tend to have a broader variety of primary source of income. Yet, EU funds remain the primary source of income for the three targeted energy saving levels.

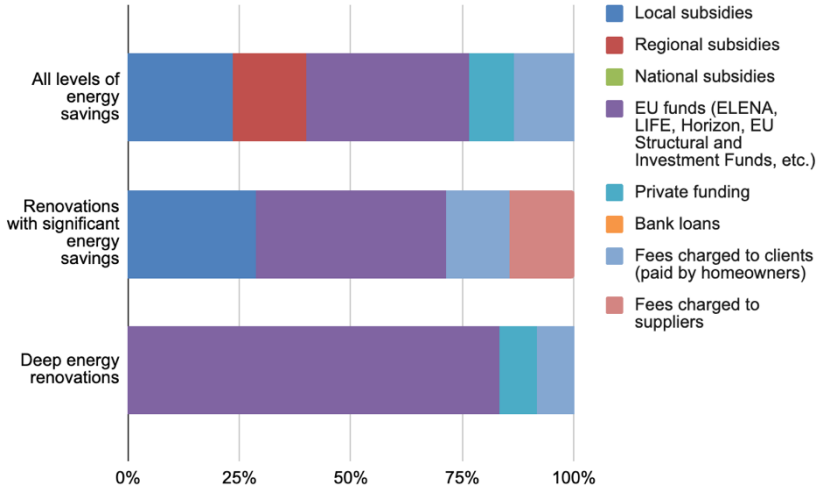

Figure 20 – Distribution of primary source of income across targeted energy saving levels

1.18. Number of employees per OSS

Half of surveyed OSS gained employees between their creation and December 2023. 40% remained stable (all of them being created between 2020 and 2025, with a vast majority in 2023 and 2024). 10% reported a loss of staff (between 0.2 to 2 FTE).

The biggest gain in terms of staff is estimated at **37.5 FTE** over 5 years of existence, moving from 5 FTE in 2019 to 42.5 FTE in December 2023 (gain of 7.5 FTE every year). In total, the 57 respondents reported 192.75 FTE at their creation against 444.8 FTE in December 2023.

The **average number of employees is overall higher for OSS targeting deep energy renovations**. In parallel, **OSS operating as municipal/regional companies or as public-private companies have the highest number of employees**. In addition, OSS operating at local or regional levels tend to have higher number of employees compared to national coverage. However, surveyed OSS operating at national levels are, in majority, newly created structures, emerging from EU-funded projects.

		Average	Minimum	Maximum
Targeted energy saving levels	*All levels of energy savings*	7.33 FTE	0.25 FTE	55 FTE
	Renovations with significant energy savings	5.51 FTE	0.6 FTE	22 FTE
	Deep energy renovations	9.31 FTE	0.55 FTE	38 FTE
Legal status	*Municipal/regional company*	20.66 FTE	2 FTE	55 FTE
	Not-for-profit	5.90 FTE	0.5 FTE	40 FTE
	Private company	3.77 FTE	1 FTE	10 FTE

	Public	3.71 FTE	0.25 FTE	15 FTE
	Public-private company	23 FTE	9 FTE	38 FTE
Service models	*Within competitive sector*	7.44 FTE	0.55 FTE	38 FTE
	Outside competitive sector	9.60 FTE	0.25 FTE	55 FTE
Geographical coverage	*Local level (only)*	8.95 FTE	0.25 FTE	42.5 FTE
	Regional level	10 FTE	0.5 FTE	55 FTE
	National level	4.86 FTE	1 FTE	12 FTE

Figure 21 – Number of employees in OSS across different typologies

1.19. Customer journey duration: average duration of services provided to homeowners and condominiums

Surveyed OSS reported a wide variation in the duration of the customer journeys, ranging from 0 months to 4 years (48 months) for single-family houses and up to 96 months for condominiums. Single-family homes tend to have shorter durations, with many responses between 6 and 24 months. 6 to 12 months appears to be the standard timeframe for a single-family home renovation. Condominium projects tend to take significantly longer, over 24 months. Many responses indicate 36 to 48 months (3-4 years). Shorter cases (less than 12 months) are rare.

To go beyond general average, the table below correlates the customer journey duration with the targeted energy saving levels (the legal status, service models or geographical coverage don't influence, from the surveyed OSS, the duration of the customer journey). **The higher the targeted energy saving level is, the longer, the journey duration is** (from 4-5 months for a light support to 12 months for a deep energy renovation).

		Avg. Duration (Months, single-family homes)	**Avg. Duration (Months, condominiums)**
Targeted energy saving levels	*All levels of energy savings*	4.33 months	9.89 months
	Renovations with significant energy savings	8 months	48 months
	Deep energy renovations	12 months	52 months

Figure 22 – Average duration journey across OSS' targeted energy saving levels

2. Impact & performance section

From the 57 surveyed OSS, 43 organisations reported data under the first metric "number of people advised". 10 out of the 14 structures which did not report figures under this metric are newly created structures that are not yet in operation (created in 2023 or 2024). The remaining 6 did not have this data available in their database.

	Number of people advised	Number of energy audits	Number of renovation contracts	Number of renovated homes
Total	95,554	24417	2266	14429
Average	2,172	498	61	328
Min	0	0	0	0
Max	24,000	6000	1000	4725

Figure 23 – Performance-related data reported by surveyed OSS

On average, the surveyed OSS reported to renovate around 328 homes per year. This figure is in line with the study by Benigna Boza-Kiss and al. (2021) where "OSS on [their] radar reported to initiate between 100 and 550 households' renovations per year during the years they were active. The OSS that are in pilot phase currently aim at an average of 10-15 projects per year."

For comparison, the EU building stock is estimated to include 220 million building units. Today, according to the European Commission[3], the weighted average rate of energy renovation is only 1% per year. Deep renovations that improve the energy performance of a building by at least 60% are annually carried out only in 0.2% of the building stock, and in only a fifth of the cases, energy efficiency is significantly improved. This means that only 440,000 homes are being deeply renovated every year in the EU.

2.1. Frequency distributions: primary source of leads

Collected data are grouped into categories based on common themes, identifying the most frequently used sources.

- **Website-based leads**: website presence appears as a dominant channel, with multiple mentions. Some OSS mention Google Ads as an additional tool to enhance visibility and capture online leads.
- **Social media based leads**: social media channels such as LinkedIn or Facebook
- **Community-based & local authorities:** municipal channels, local events, physical presence/office
- **Traditional media:** local press
- **Collaboration & partnerships**: energy community, banks, NGOs, national network/brand (France Rénov' network)

Website-based leads (40.5%): This is by far the dominant category. The website is the central tool for generating leads, along with Google Ads and other digital means like webinars. It suggests that improving website functionality, user experience, and visibility (especially with tools like Google Ads) should be prioritized.

[3] https://ec.europa.eu/commission/presscorner/detail/en/qanda_20_1836

Social media-based leads (10.8%): social media still plays a significant role in lead generation, though it's a secondary source compared to websites.

Community-based and Local Authorities (18.9%): Municipal channels, local partners, and word of mouth show a strong role in generating leads. These results suggest that offline efforts, such as local events and physical presence in neighbourhoods, continue to be valuable. One example is the establishment of a container acting as a physical point in the neighbourhood.

Traditional Media & Offline Channels (8.1%): Traditional methods such as local press and physical events still play a role, but they are secondary to digital channels. It shows that offline methods are still effective in certain cases.

Collaborations and Partnerships (5.4%): Partnerships and national brands like France Rénov' network[4] play a smaller role in lead generation but are valuable for tapping into national networks.

2.2. Marketing & customer engagement vs. project uptake

2.2.1. Primary source of lead vs. conversion rate

Every step of the customer journey takes a certain time and at every step, some clients drop out off the process. The example of the OSS KAW/Reimarkt (NL), involved in the Innovate project, estimated that the conversion rate is between 0,5 and 10% from initial contact to actual renovation. The table below shows a breakdown of the conversion rates throughout the process for KAW/Reimarkt between January and September 2019.

Process	Conversion (%)
Contact -> lead	10%
Lead -> offer	35%
Offer -> signed offer	22%
Signed offer -> renovation works	80%
Total conversion: lead -> renovation works	6%

Figure 24 – Conversion rates for KAW/Reimarkt OSS in 2019

Another example, the "Woon WijzerWinkel" OSS in Rotterdam, achieved a 25% conversion rate in 2021.

To assess the conversion rate between the initial advice, project design (diagnosis, energy audits, scenarios), and actual renovation contracts, we need to calculate the conversion at each stage.

- *Conversion rate from initial advice (step 1) to project design (step 2) = number of project designs/number of initial advice x 100*

The average step 1 (initial advice) to step 2 (project design) conversion rate is 30.89%.

There is a huge variation in conversion rates, ranging from 0.10% (1 out of 1000) to 100% (1,500 out of 1,500). Many projects fall in the 15-30% range.

[4] https://france-renov.gouv.fr/

- *Conversion rate from project designs (step 2) to renovation contracts (step 3) = number of renovation contracts/number of project design x 100*

The average step 2 (project design) to step 3 (renovation contract) is 40.30%.
Some projects have very high conversion rates from step 2 to step 3 (80%+). Other cases show a complete drop-off (0%).

- *Conversion rate from initial advice (step 1) to renovation contracts = number of renovation contracts/number of initial advice x100*

The average step 1 to step 3 conversion rate is around 16%. This figure is calculated based on a small sample of 12 OSS. The best cases are most of the time, **private companies or non-for-profit organisations operating on a fee-based. The 7 best cases, having the highest conversion rate, are either private companies or non-for-profit. The remaining cases are municipal/regional companies.** The targeted energy saving levels tend to not influence the conversion rate. The two best cases focus on all levels of energy savings, while the 3 following either target renovations with significant energy savings or deep renovations.

3. National context

At the end of the survey, respondents were asked to evaluate to which extent (from 0 - not at all to 10 - yes, very much!), the national legislative framework is favourable for OSS and if OSS are recognised in their respective country as a key tool for accelerating the building renovation (from 0 - not at all to 10 - yes, very much!).

3.1. From the OSS' point of view

- Legislative framework favourability: how supportive respondents find their national framework for OSS/IHRS: **4.93** (on a scale of 1-10)
- OSS recognition as a key tool: the extent to which OSS/IHRS are recognised as a key tool for building renovation: **4.81** (on a scale of 1-10)

We decided to isolate countries where very few contributions were received (less than three). Belgium (5 contributions), Bulgaria (7), Hungary (3), Italy (6) and Spain (11) are the only countries where at least three contributions were received.

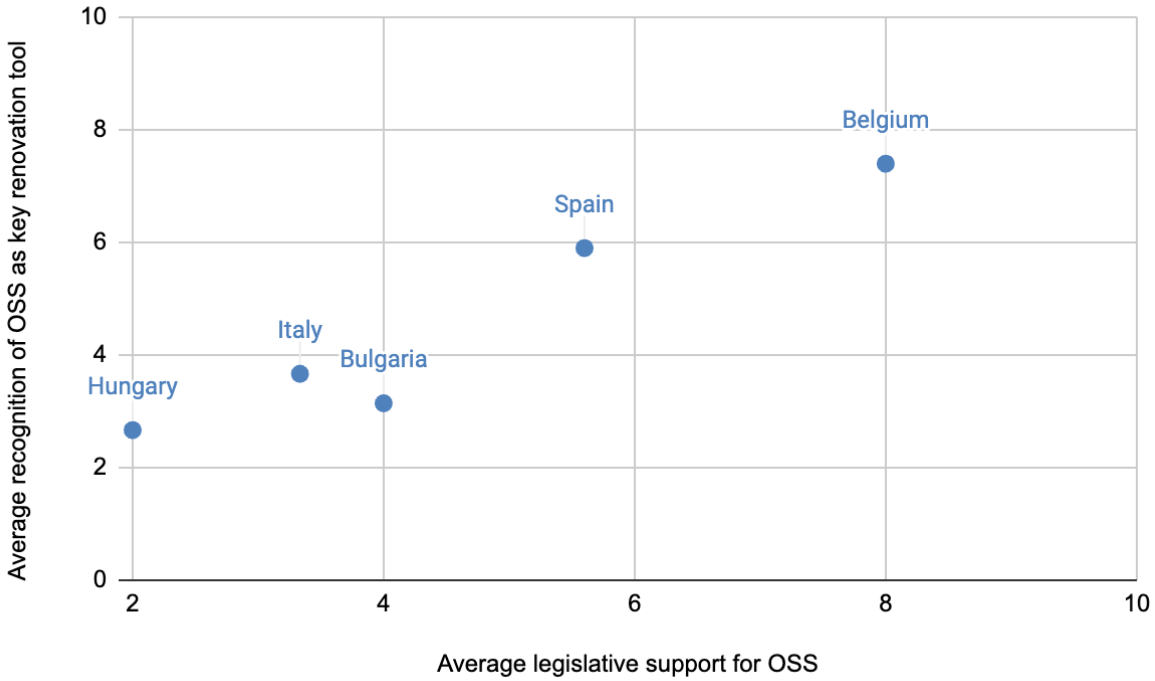

Figure 25 – Legislative support vs. recognition of OSS per country (averaged – according to OSS)

4. Conclusion & main takeaways

This survey provides a detailed look into the functioning and impact of 57 One-Stop-Shops (OSS) across the EU. While not exhaustive, the findings reveal some patterns that can inform policy strategies to scale up OSS as a key instrument for driving residential energy renovation.

1. OSS are rapidly expanding and maturing.
More than two-thirds of the surveyed OSS were created after 2020, demonstrating that the model is recent but gaining traction—largely driven by EU policy and funding streams.

2. Regional and public-led OSS dominate the landscape.
Almost half of OSS operate at regional level, and around 74% involve public authorities in their governance. This highlights the central role of the public sector in enabling OSS, especially in terms of accessibility and neutrality.

3. Service focus varies, but private and hybrid models tend to go deeper.
While most OSS support all renovation levels, those managed by private or public-private partnerships are more likely to specialise in deep renovations. They also tend to charge fees and engage directly in renovation works, contrasting with public OSS that focus on guidance and coordination.

4. Revenue streams remains diverse but fragile.
On average, OSS report using 2.3 sources of income, yet most remain heavily dependent on EU or public funds. There is a notable reliance on EU funds for the three different models, underlining potential sustainability issues if alternative sources are not scaled.

5. Financing and ambition go hand in hand.
While only a minority of OSS offer direct financing, direct financing is somehow linked with deep renovation projects, with a notable portion of those focusing on ambitious energy upgrades. This reinforces the need for financial instruments tailored to deep retrofits.

6. Diverse pricing and service models co-exist.
OSS use a mix of fixed rates, variable pricing, and percentage-based pricing to structure services. 60% of surveyed OSS reported to provide their services for free, but 28% involve services where homeowners pay a fee that does not fully cover costs, and 12% rely only on payments from homeowners covering their entire costs.

7. Conversion from advice to action is limited.
On average, only 16% of advised clients proceed to actual renovation contracts. While individual OSS reach impressive results (25–40% conversion in some cases), the majority experience substantial drop-off across the customer journey, pointing to the need for stronger support mechanisms and simplification.

8. National frameworks are still inadequate.
Across the board, OSS perceive their national legislative contexts as only moderately supportive (average score below 5/10). They also report limited recognition as strategic players in renovation efforts, signalling a need for stronger institutional backing at national level.

9. OSS show strong potential—but need structural support to scale.
With over 95,000 people advised and more than 14,000 homes renovated by the 57 surveyed OSS in 2023 alone, OSS show strong potential. However, to deliver on EU renovation goals, OSS must be better financed, more widely recognised, and supported by aligned policy frameworks.

5. List of respondents

One-Stop-Shops

Renesco	Latvia
Hauts-de-France Pass Rénovation	France
FaciRénov	France
Oktave	France
VšĮ „Atnaujinkime miestą“ (abbr. Amiestas)	Lithuania
Oficina de l'Energia de Valencia	Spain
Centre Val-de-Loire Energies	France
Renov'Occitanie	France

North West Energy Agency	Ireland
Porto Energy Hub	Portugal
RenoPont (aliroda)	Hungary
EcoVision (Energy Communities Tipperary Cooperative)	Ireland
Ni un hogar sin energía	Spain
Groepsaanbod renovatie (=existing) and Renovatiekompas (=starting)	Belgium
Energy House Limburg	Belgium
Energiehuis Warmer Wonen	Belgium
Impala Projects SL	Spain
ImmoPass	Belgium
GarrotxaDomus	Spain
Oficina energia de Valencia	Spain
Hamburger Energielotsen	Germany
Sportello Energua & condomini (EASIER)	Italy
HAUSKUNFT Wien	Austria
Stichting WoonlastenNeutraal Renoveren (WNR)	Netherlands
Ecofurb	The UK
RenoPont Energy Home Renovation Centre	Hungary
KLIK Križevci - OSS za cjelovitu energetsku obnovu doma	Croatia
Center for energy efficiency Gabrovo	Bulgaria
OSS Regional do Projeto EUROPA	Portugal
Sportello Energia di Padova	Italy
Rīgas energoefektivitātes informācijas centrs (REIC)	Latvia
Oficina de Asesoramiento e Impulso a la Rehabilitación	Spain
Homegrade	Belgium
OFICINA VERDE (GREEN OFFICE)	Spain

Deciwatt	Italy
Sportello Energia Piemonte	Italy
Hogares Saludables	Spain
Transition Point One-Stop Shop	Portugal
Tramiteco	Spain
ЦКО БАКК	Bulgaria
People Powered Retrofit	The UK
Sportello Energia Clima - Climate and energy office	Italy
COHEAT	Denmark
Център за комплексно обслужване за обновяване за енергийна ефективност	Bulgaria
Център за устойчиви услуги	Bulgaria
MultiHome	Bulgaria
SomDom Kft.	Hungary
HORIS - local name tbd	Italy
Пробуждение ЕООД	Bulgaria
KlimaTreff	Germany
ЦКО БРТК (OSS BRCC)	Bulgaria
CONCERTO RENOV	France
crOss renoHome - OSS Zagreb, OSS Križevci and Rehabta ured	Croatia
BiBiZi	Spain
ΕΝΕΡΓΕΙΑΚΗ ΣΤΕΓΗ	Greece
OSS Czech Republic	Czech Republic
HORIS	Spain

Support structures

National Technical University of Athens	Greece

VEKA is the Flemish Energy and Climate Agency	Belgium
Raj-Ta Kft.	Hungary
Archenerg Cluster	Hungary
LENERG Energy Agency	Hungary
Municipality of Tilburg	The Netherlands
Hungarian Energy Efficiency Institute	Hungary
City of Križevci	Croatia
The Energy Center of the Usti Region	Czech Republic
Energiehuis Oostende	Belgium
ISQ Group	Portugal
Wuppertal Institut	Germany
Linnaeus University, Sweden	Sweden
Municipality of Tilburg	The Netherlands
DECO PROteste	Portugal
Parakar Services FRANCE	France
TU Delft	Netherlands
ARCHENERG	Hungary
TU Delft	The Netherlands

Table of figures

Sources

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