EU PEERS

Community for Integrated Home Renovation Services

10 Key Takeaways

from the 2026 EU Peers Survey on One-Stop Shops in Europe

Co-funded by the European Union

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INSIGHTS FROM ONE-STOP SHOPS FOR RESIDENTIAL ENERGY RENOVATION IN EUROPE

10 TAKEAWAYS FROM 76 ORGANISATIONS

This brief presents the main findings from the second EU Peers survey edition (2026)

76 organisations from across Europe took part, including 35 operational One-Stop Shop (OSS) providers and 41 organisations supporting OSS development, such as energy agencies, networks, public authorities and policymakers. All responses were anonymised and aggregated for analysis.

1. OSS are expanding across Europe

Most surveyed OSS were established after 2020. This confirms the emergence already observed in the first EU Peers survey. The sector has evolved from isolated pilot projects into a growing market of integrated renovation services, supported by evolving EU policies and funding programmes.

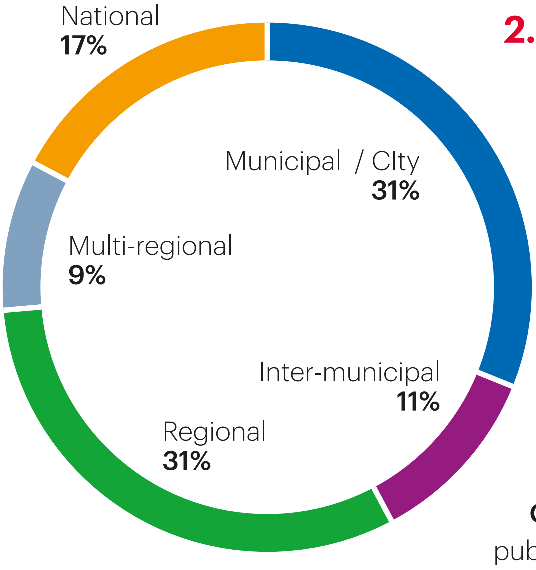

Figure 1 – Distribution of geographical coverage across respondents.

2. OSS are primarily local and regional entities

More than 60% of the surveyed OSS operate at municipal or regional level. This strong local dimension appears to be one of the defining strengths of the OSS approach, enabling them to build trust with homeowners and tailor services to local housing markets and administrative contexts.

At the same time, the presence of national schemes demonstrates that **the OSS concept is sufficiently flexible to operate effectively at different territorial scales**.

3. There is no single OSS model

OSS operate under different governance structures: public, private, public-private partnerships, cooperatives and NGOs. As in the first survey, no dominant model emerges. This diversity reflects the adaptability of the OSS concept to different policy priorities, financing arrangements, and service delivery needs.

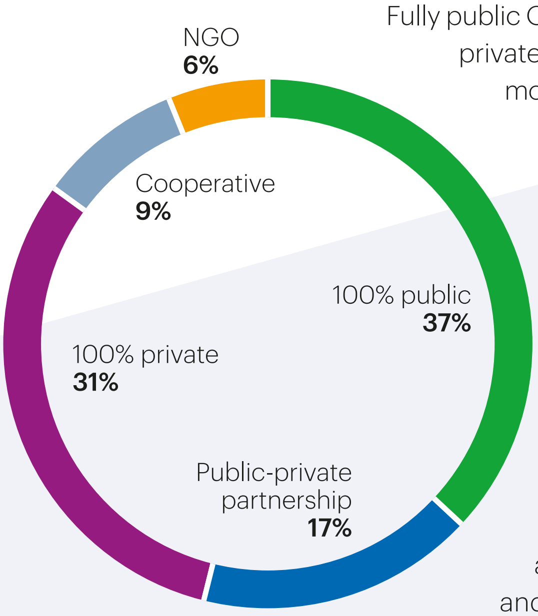

Figure 2 – Legal status of OSS.

The analysis also shows a **strong link between OSS legal status and service cost models:** Fully public OSS provide services free of charge, ensuring maximum accessibility, while private OSS rely more on user payments and cost-recovery mechanisms. Hybrid models, such as public-private partnerships, NGOs and cooperatives, generally combine free services with alternative funding schemes or partial contributions. These different financing approaches reflect the challenge of balancing affordability for homeowners with the long-term financial sustainability of OSS operations.

4. Guidance is widespread, end-to-end renovation remains less common

Advisory and guidance services are almost universal among OSS, with most offering an integrated package covering several stages of the renovation journey. However, the scope of support varies depending on the organisation behind the OSS, and fewer provide comprehensive assistance spanning project implementation, financing, quality assurance and monitoring. **Many OSS therefore still operate primarily as advisory centres rather than offering full end-to-end renovation support.**

5. The main challenge is converting interest into renovation

OSS reach thousands of homeowners, but the **biggest critical transition remains converting initial enquiries into energy audits**. Once households enter the assessment phase, renovation completion rates increase significantly.

6. OSS operate at very different economic scales

OSS vary widely in financial scale, with half operating on annual budgets below €100,000, while legal status is partly associated with their economic size.

However, financial resources alone do not determine effectiveness: conversion rates vary considerably across OSS of similar size, suggesting that organisational design, local engagement and service quality are at least as important as budget size.

7. Public funding remains essential

Public funding accounts for the majority of OSS resources, particularly for public organisations. This finding is consistent with the first survey and underlines that stable public support remains a prerequisite for many OSS. Long-term public investment remains critical to ensure continuity, accessibility and long-term market confidence and development.

8. Energy poverty is becoming part of the OSS mission

Two-thirds of surveyed OSS offer at least some tailored support to vulnerable households, most commonly renovation guidance and access to subsidies, but services vary widely and there is not yet a common approach across the sector. Identifying and reaching vulnerable households remains a major challenge, as OSS rely heavily on existing welfare and administrative systems while proactive outreach and data-driven approaches are still underdeveloped.

9. Multidisciplinarity and partnerships to tackle energy poverty

The most successful approaches combine technical, financial and social support through cooperation with municipalities, social services and community organisations. Partnerships are key to tackling energy poverty.

10. The next challenge is scaling up

Compared with the first survey, the discussion has shifted from understanding what OSS are and how to demonstrate their value towards understanding how they can be scaled to meet Europe's renovation objectives and establish them firmly within the energy renovation market. **Stable funding, stronger institutional recognition and better coordination emerge as the three key conditions for growth.**

The required "quantum leap" therefore depends on combining financial stability, political backing and integrated institutional systems. Together, these conditions can enable OSS to move from successful individual initiatives towards a mature and scalable pillar of Europe's renovation system.

Conclusions

The survey confirms that OSS are becoming a strategic tool for implementing Europe's energy renovation policies. Despite their diversity, successful OSS share common traits: strong local presence, integrated services, trusted relationships with homeowners and close cooperation with public authorities. To scale up their impact, OSS need stable funding, stronger policy integration and sustainable business models. If these conditions are met, OSS can play a central role in accelerating residential energy renovation across Europe.

We gratefully acknowledge the contribution of all One-Stop Shops and supporting organisations that took part in this survey. Taken together, the first and second EU Peers surveys provide important insights into residential renovation OSS for renovation across Europe. For the full report of the second survey (2026) please click here. The takeaways from the first survey (2024) are available here.

EU Peers is the European Community of Practice supporting the development and impact of One-Stop Shops for residential energy renovation. Through European and national Community Platforms, it enables peer learning, collaboration and knowledge exchange among practitioners and other stakeholders. The LIFE co-funded project (09/2023 - 08/2026) is coordinated by Climate Alliance, delivered by a consortium of eleven European partners, and succeeded by EU Peers II (09/2026 - 08/2029).