

**Meeting minutes 2nd stakeholder meeting of the 2nd technical support study supporting the establishment of a Smart Readiness Indicator (SRI) for buildings**  
**9 October 2019 @ Madou, Brussels (+ webstream)**  
**14h00 - 16h50**

## Welcome

Stijn Verbeke (VITO) welcomes the audience, both at the venue in Brussels and those following online. Attendees are reminded that the meeting is streamed online and recorded.

## Welcome by EC

Paula Rey Garcia welcomes the audience. It is highlighted that the SRI fits with two priority objectives of the EU: the new green deal, and getting the EU fit for the digital age. In the mission letter on energy by the EU president-elect, there is an important focus on implementation, a focus on the energy-efficiency-first principle, a cross-sectoral approach and the need for financial incentives and scale up of investments. It is important that the SRI implementation proceeds swiftly towards 2020. It is stressed that the SRI will not be implemented in a static way, but a process will be set up to ensure it keeps in tune with technological advancements.

## Overview of the aims, status and the planning of the project

Stijn Verbeke provides an overview of the project goals and some major milestones achieved. Attendees are referred to the second interim report for more technical details.

## Steps taken towards definition of the SRI calculation methodology

Dorien Aerts (VITO) provides the main outcomes of the second interim report on the definition and calculation methodology of the SRI. A member of topical stakeholder group B briefly presents the process and main points discussed. The consortium announces the setup of topical group C, focusing on future-proofing the SRI, e.g. through an automated operational assessment.

## Steps taken towards implementation and formatting of the SRI

Paul Waide (WSEE) summarises the potential pathways for implementation and recaps the findings of the consumer focus groups. A member of topical stakeholder group A briefly presents the process and main points discussed.

## Provisional impact assessment of the SRI

Paul Waide presents the main outcomes of the EU impact assessment published in the second interim report.

## Initial feedback from the testing phase

A dry run test with 11 members of the topical stakeholder groups has run in August. Based on this feedback, the testing package for a public test has been updated. This public testing phase of the SRI is ongoing and will run until mid-November. 85 people have already registered, but interested stakeholders can still sign up at this stage. It is stressed that the calculation sheet and inspection guidelines are draft deliverables of the study team, and will differ considerably from an actual implementation in member states. Dorien Aerts presents the results of 8 test-buildings, underpinning that the assessment process proves feasible and that relatively high SRI scores can effectively be achieved.

## Q&A: summary of the main comments

- The process of working with consumer focus groups was well supported, but it is suggested to also explicitly look into the added value for stakeholders in the implementation pathways and explore their willingness-to-pay.
- In the impact analysis and domain weighting factors, 5 climate zones are used to allow sufficient differentiation. A stakeholder suggested to use the climatic zones of Ecodesign instead. Such a choice would be beneficial if at some point the assessment of the SRI would rely on a database. In discussions with topical group B, an approach relying on a database was not favoured as it would be difficult to set up and because actual smart services often requires multiple products to work seamlessly together. A database could nevertheless be beneficial as an aid to an assessment, especially also for retrieving information on cyber-security and interoperability.
- A stakeholder requested to provide detailed tables with weighting factors for all domains and impacts.
- In response to stakeholder questions, the consortium stresses that there are methodological differences between simplified method A and detailed method B, and that both methods will not result in the same score. In communication and implementation a clear distinction needs to be made.
- In the implementation, various options are still possible; e.g. restricting either of the methods to particular building types. Also the type of assessor/assessment (e.g. external auditor or self-assessment, online or offline tool...) could be applicable to either of the methods. One stakeholder remarks that mixed-use buildings would require a further analysis; for such buildings, there could be the need to specify whether an SRI is issued at building level or at unit level.
- A process of accreditation and certification of assessors will be needed in case the pathway of validated external SRI assessors. A constraining factor is the capacity of the workforce to implement the SRI.
- A stakeholder suggests to look into options for international application.
- A stakeholder suggests to differentiate the 'needs from the energy grid' in rural versus urban settings.
- A few stakeholders asked questions on the comparability of SRIs. Buildings are to be compared to "their best possible version of a particular building". This approach has been favored since ultimately it would be unfair for a building to have lower scores if it does not have specific functions which it wouldn't need (e.g. a building which does not need cooling by design). The weighting factors for different climate zones also pose limitations to the comparability. In the end, the services and service levels will be uniform and allowing a level playing field to commercialise smart technical building systems.
- It is noted that no decisions are made yet on the governance of the SRI, e.g. with regard to the management of the label.

- A stakeholder asked whether the SRI can be mandatory. The consortium clarified that Member states can choose how they implement the SRI, this could potentially include a mandatory assessment for specific building types.
- Monitoring and automated data gathering can also be an aid to the assessment according to method A and B: it can be envisioned that some of the service levels are automatically reported by the building or its technical building systems.
- It is suggested to also analyse the costs of the SRI assessment itself in the impact assessment, noting that the costs can differ greatly between self-assessment and expert assessments.
- It is stressed that the SRI is an informative instrument, not aiming to impose a minimum level of smartness for particular buildings.
- Stakeholders are invited to provide further comments through the survey on the second interim report.

### Next steps towards legal acts

Sylvain Robert (DG ENER) reminds the legal basis for the establishment of the SRI. The implementing act will be discussed with the energy performance of buildings committee. At least two exchanges are planned in view of a vote that could take place around mid-2020. The delegated act which establishes the definition and calculation methodology will be discussed with the expert group of the Energy Performance of Buildings Directive. An impact assessment will accompany the legal acts. The regulatory scrutiny board has already provided some feedback in a preparatory meeting. The aim is to finalize the impact assessment report as soon as possible, to inform the preparation of the legal acts.

The work of drafting the acts has started but is still in preparatory phase. It is clear that one key request from the stakeholder community, is that the SRI has common methodological foundations, which should be set in the acts themselves. A platform to support the implementation and further evolutions of the scheme could also be established. The acts will further define how the optionality of the scheme translates in practice and will set out some key support measures for the implementation of the SRI. Stakeholders were encouraged to participate in the open public consultation on the SRI, which closed mid-October.

### Closing words

Stijn Verbeke closes the meeting by thanking all stakeholders for their attendance and contributions, and inviting them to participate in the testing phase and the open surveys.

Closing of meeting 16:50.