



OSSs mid-term evaluation report

Deliverable 5.3 of the SHEERenovPlus project

Responsible partner: BACC

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INTRODUCTION

This report presents the consolidated mid-term evaluation of the six One-Stop Shops (OSS) established under the LIFE22-CET-SHEERenovPlus project. The report is based on the individual assessments prepared by each OSS and integrates them into a unified picture of the progress achieved and the challenges encountered in the implementation of the one-stop-shop model.

The evaluation covers the OSSs and their business models, assessed against the provisions and key performance indicators defined in the project and the business plans, as well as in relation to the current market conditions and financing environment. The evaluation encompasses: (i) the environment and conditions in which the OSS operate; (ii) the organisation and management of the OSS; (iii) the deployment and usability of the digital platform; (iv) progress in the number of clients/buildings served, implemented pilot projects and other key indicators from the project proposal; (v) partnerships with municipalities, financial institutions and local professionals; (vi) the structure of OSS revenues and expenditures and the extent to which it is confirmed in practice; (vii) communication and marketing activities.

It should be noted that the operational period of the OSSs is not uniform. Five centres – Sofia, Burgas, Stara Zagora, Plovdiv and Gabrovo – have been functioning since the beginning of the project, while the OSS in Ruse started later, as it introduced a new business model for the organisation. For this reason, the achieved results should be interpreted in the context of the different levels of maturity and the specific characteristics of each model.

The evaluation has been carried out within the established Monitoring & Evaluation framework and examines progress against the predefined provisions and key indicators of the OSSs' business plans. It is conducted one year before the end of the project – a crucial moment at which the centres are expected to fully deploy the capacity of the digital platform, integrated services and partnership mechanisms.

The report synthesises the individual results, identifies both common and OSS-specific findings and formulates recommendations for the final year of the project, aimed at enhancing efficiency, accelerating progress and preparing the groundwork for sustainable operation beyond the project's duration.

ASSESSMENT OF THE ENVIRONMENT AND OPERATING CONDITIONS OF THE OSS

The key evaluation element examined in this section is: **“To what extent do the provisions and conditions outlined in the business plan remain valid?”**

Presented below are the individual assessments of the six OSSs:

How has the competitive environment changed since the start of OSSc operations?	
BACC – Sofia	☒ No significant change The OSS continues to operate in a similar market environment; the number and profile of competitors remain largely unchanged. <i>The competitive landscape remains stable. No new entities offering a full package of integrated one-stop-shop services have entered the market. BACC maintains its position as a leading provider of comprehensive renovation services in Sofia. In this context, the main focus is on increasing efficiency and expanding the client base rather than responding to competitive pressure.</i>
Probuzhdenie EOOD – Burgas	☒ No significant change The OSS continues to operate in a similar market environment; the number and profile of competitors remain largely unchanged. <i>The competitive environment is stable, with no new entrants offering a full package of integrated one-stop-shop services.</i>
Energy Saving EOOD – Stara Zagora	☒ No significant change The OSS continues to operate in a similar market environment; the number and profile of competitors remain largely unchanged. <i>The competitive environment remains stable. No new structures have emerged that offer a full package of integrated OSS services. Energy Saving OSS retains its position as a leading provider of comprehensive building renovation support in Stara Zagora. In this environment, the focus is on improving efficiency and expanding outreach rather than reacting to competition.</i>

BRCC - Ruse	☒ No significant change The OSS continues to operate in a similar market environment; the number and profile of competitors remain largely unchanged. <i>Due to the unique nature of its service model (a hub supporting the local ecosystem for energy efficiency and RES), BRCC OSS does not face direct competition from local providers. No significant market changes have been observed. Therefore, no substantial shifts in the competitive environment have occurred since the OSS began operating.</i>
EVN TP - Plovdiv	☒ No significant change The OSS continues to operate in a similar market environment; the number and profile of competitors remain largely unchanged. <i>The main market players remain the same, and the profile and number of competitors have not changed. Market conditions and demand for the OSS services remain stable.</i>
Municipality of Gabrovo	☒ No significant change The OSS continues to operate in a similar market environment; the number and profile of competitors remain largely unchanged. <i>The local market remains highly fragmented, with no coordinated offering of comprehensive renovation services. None of the identified private actors has developed a model comparable to the OSS, nor have they significantly expanded their scope of services in recent years.</i>

The analysis of the individual assessments shows that the competitive environment remains relatively stable, with no significant new entrants offering an integrated one-stop-shop service. The OSS model continues to be unique within the local markets. Competitive pressure on the OSS is low; however, this does not automatically translate into higher homeowner engagement, as demand depends on other factors such as available financing, administrative procedures, and the willingness and ability of owners to provide co-financing.

Conclusion: Competition is not a limiting factor for OSS performance, but the absence of competitors does not offset the existing institutional and financial barriers — such as unpredictable national programmes, complex procedures, the lack of banking instruments, and the still undefined formal role of OSS within national schemes. These factors have the strongest influence on the pace of renovation and significantly constrain the impact that OSS centres are able to achieve.

How does the availability/lack of financing programmes affect the sustainability of the OSSs?	
BACC – Sofia	☒ Strong impact <i>The availability of financing programmes, combined with promotional and informational campaigns about the OSS, stimulates demand for OSS services.</i>
Probuzhdenie EOOD – Burgas	☒ Strong impact <i>The availability of financing programmes, together with communication activities, significantly increases demand for OSS services.</i>
Energy Saving EOOD – Stara Zagora	☒ Strong impact <i>Financing programmes, combined with awareness-raising efforts about the OSS, have a direct positive effect on homeowners' interest and the uptake of services.</i>
BRCC - Ruse	☒ Strong impact <i>The existence of financial support schemes for building renovation is a strong motivating factor. In the absence of such programmes, the OSS maintains regular informational activities but cannot justify large-scale marketing efforts.</i>
EVN TP - Plovdiv	☒ Strong impact <i>The presence or absence of active programmes directly affects OSS sustainability. When programmes are active, they generate an additional inflow of clients.</i>
Municipality of Gabrovo	☒ Strong impact

	<i>The reliance on 100% grants and the episodic announcement of programmes with limited budgets and short application windows exerts both positive and negative effects—but in all cases, the impact on OSS operations is substantial.</i>
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All six OSSs assess the influence of financing programmes as “strong”, indicating a clear dependency between the availability of public support and the demand for their services. In every case, the OSSs report that the presence of an active programme—combined with targeted communication activities—leads to a substantial increase in interest from homeowners and associations, as well as a greater willingness to take concrete steps toward renovation.

In the absence of a programme, the OSS operate mainly in a mode of maintaining general awareness, without the possibility of generating a meaningful volume of consultations or projects.

Conclusion: There is a systemic and strong dependence of all OSSs on the availability of public financing. This places them in a “project mode”, in which activity increases only when a programme is active. When programmes are absent, the market potential of the OSS service is directly reduced: homeowners postpone decisions and avoid commitments in the absence of clarity regarding the support conditions they may receive.

The sustainability of the OSSs remains limited, as their revenues depend largely on project-based funding rather than on market-driven services or banking instruments. A transition from a project-based to a market-based model is only possible if a financial instrument is introduced that enables homeowners to finance their share—for example, a credit line, a guarantee fund, or a support scheme for energy-poor households.

In the long term, the sustainability of the model requires a predictable, continuous financing programme that avoids stop-and-go cycles and ensures a stable flow of clients.

Which factors limit homeowners' activity/engagement?	
BACC – Sofia	☒ Complex procedures ☒ Lack of targeted banking products ☒ Lack of targeted support for energy-poor households
Probuzhdenie EOOD – Burgas	☒ Complex procedures ☒ Lack of targeted banking products ☒ Lack of targeted support for energy-poor households ☒ Lack of financial resources
Energy Saving EOOD – Stara Zagora	☒ Lack of targeted banking products ☒ Lack of targeted support for energy-poor households
BRCC - Ruse	☒ Complex procedures ☒ Lack of targeted banking products ☒ Lack of targeted support for energy-poor households ☒ Lack of financial resources
EVN TP – Plovdiv	☒ Complex procedures ☒ Lack of targeted banking products ☒ Lack of targeted support for energy-poor households
Municipality of Gabrovo	☒ Lack of trust ☒ Lack of targeted banking products ☒ Lack of targeted support for energy-poor households

Homeowner activity/engagement remains limited primarily due to a combination of administrative, financial and social barriers. All OSSs identify nearly the same limiting factors, indicating a strong systemic nature of the challenges affecting the renovation process:

- Complex application procedures continue to be a major obstacle. They require administrative capacity, coordination and documentation that many buildings and homeowner associations cannot manage independently. This leads to early-stage delays or complete withdrawal from the process.
- The lack of targeted banking products is a defining barrier, highlighted by all OSSs. Without an instrument that allows homeowners to finance their share, renovation cannot begin unless full grant coverage is available. This blocks real demand and places OSSs operations in a “waiting mode” dependent on national schemes.
- The absence of targeted support for energy-poor households creates internal blockages within buildings: even when the majority is motivated, one or two vulnerable households can prevent the building from taking a decision to renovate. This further deepens social exclusion and reduces engagement precisely among those who need renovation the most but cannot co-finance it.
- The lack of financial resources among part of the homeowners, reported particularly by Burgas and Ruse, additionally restricts the possibilities for co-financing and introduces significant uncertainty during planning.

In addition, OSSs point to several systemic external factors:

- Delays in national programmes and financing instruments have led to a loss of momentum gained during stages 1 and 2 of the National Recovery Plan Programme. Interest cools down, and some homeowners become hesitant or withdraw, reducing the volume of consultations.
- Contradictory public signals regarding the level of grant support and co-financing requirements create confusion and substantially increase the need for clarification by the OSSs.
- The absence of clearly defined eligibility of OSSs costs as technical assistance contradicts established EU practices and limits the possibility for sustainable financing of OSSs services.

Conclusions:

- i. Financing programmes are the single most important factor determining

homeowners' readiness to proceed with renovation and to engage with the OSS. In their absence, interest drops sharply, regardless of communication and outreach efforts.

- ii. Socio-economic conditions (lack of financial resources, energy poverty, low trust) form the second most significant group of barriers. They hinder even motivated buildings and limit market potential in many municipalities.
- iii. An insufficient institutional framework—particularly the lack of support for energy-poor households and the absence of appropriate banking instruments—makes renovation dependent on grant funding and prevents the emergence of a market-driven model.
- iv. The competitive environment has minimal influence, as OSS centres offer a unique service and face no real competitors. However, this does not offset the structural barriers that hinder renovation.
- v. The issue of OSS cost eligibility under financing schemes is a strategic barrier: without its resolution, OSSs cannot ensure financial sustainability nor scale up the range of services offered.

ASSESSMENT OF ACHIEVED PROGRESS

In relation to the provisions of the Business plan

The evaluation element examined in this section is: **“To what extent are OSS activities being implemented in accordance with the provisions of the Business plan?”**

The assessment focuses on the following dimensions:

Organisation and Management	
BACC – Sofia	The organisational structure is fully established, and staff perform the functions foreseen in the Business Plan. All key roles are in place, with external experts engaged when necessary. No gaps have been identified whose correction would significantly improve effectiveness. It should be noted, however, that the assessment is based on operations carried out under project conditions and not at full market scale. Under these circumstances, no material shortcomings in organisation or processes have been observed. A comprehensive and substantiated assessment of efficiency would be possible once the OSS operates in a real market environment, where service volumes and team workload allow for more accurate measurement of time and resource efficiency. Market conditions may also reveal specific optimisation opportunities—for example, further development of the digital platform with automated analytics tools, financial simulations, virtual consultations, a client management system, etc.
Probuzhdenie EOOD – Burgas	
Energy Saving EOOD – Stara Zagora	
BRCC - Ruse	
EVN TP - Plovdiv	The organisational structure of the OSS is fully established in accordance with the parameters set out in the Business Plan. All key units and roles are defined and functioning according to their assigned tasks. The experts carry out the planned activities, including consultations, administrative support, coordination and client interaction.
Municipality of Gabrovo	The organisational structure of the OSS operates fully in line with the Business plan, building upon the existing model of the municipal Administrative Service Centre through the involvement of the project team, external experts when needed, and specialists from various municipal departments. This multidisciplinary approach ensures objectivity and impartiality. The staff perform the planned functions, including administrative assistance, clarification of procedures, technical and organisational support, and ongoing communication with homeowner associations and citizens.

The organisational structures of all OSSs are established and functioning in accordance with the planned roles and responsibilities. Key positions are filled, and external experts are engaged when needed, ensuring flexibility and access to specialised expertise. At this stage, OSSs do not report any significant gaps in organisational setup or management processes that would hinder operational effectiveness.

It is important to note that the assessments are based on OSSs functioning under project-funded conditions and with a limited workload. At this scale, it is natural that process-related bottlenecks or capacity constraints may not yet be apparent. A full and substantiated evaluation of management efficiency would be possible only once service volumes increase and the centres operate under real market pressure.

A transition towards a market-based model, combined with higher service volumes, would likely reveal specific optimisation needs—for example, expanded use of the digital platform, process automation, and the introduction of CRM solutions for client management. These improvements are not critical at the present stage but will become essential for the long-term sustainability and operational efficiency of the OSSs.

Conclusion: The organisation and management of the OSS are appropriately structured for the current project phase and operate without significant shortcomings. The available capacity is sufficient for the present workload; however, a realistic assessment of management efficiency will only be possible under conditions of higher operational volume and genuine market demand.

Digital Platform	
BACC – Sofia	During the period subject to assessment, the platform had not yet been launched. As of 30 September 2025, the core functionalities have been successfully validated — including the database of trusted local professionals, the energy savings calculator, the partnership management module and the creation of client dossiers. The assessment of its impact on OSS processes will be addressed in Deliverable D5.6.
Probuzhdenie EOOD – Burgas	
Energy Saving EOOD – Stara Zagora	
BRCC - Ruse	
EVN TP - Plovdiv	
Municipality of Gabrovo	

During the period under assessment, the SHEERenovPlus digital platform was still under development and in test operation, with its full deployment into the OSSs day-to-day activities beginning only at the very end of the assessed period. As of 30 September 2025, the core functionalities have been successfully validated, including:

- a database of trusted local professionals,
- an energy savings calculation tool,
- a partnership management module, and
- the clients' dossiers.

Since the platform's introduction coincides with a period of limited workload and the absence of active financing programmes, a complete assessment of its actual usefulness, usability and impact on OSS operational processes cannot yet be made. Its practical application will be evaluated in Deliverable D5.6, once the platform has been used for at least 10 months.

At this stage, the platform constitutes a technically completed system; however, it has not yet undergone sufficient real-life use to allow analysis of its strengths or limitations. Wider promotion among end-users and more extensive adoption by OSS teams are still forthcoming.

Conclusion: The platform is technically complete with all key functionalities validated, but it has not yet been tested in a fully operational environment. A comprehensive assessment of its usability and effectiveness is still ahead.

Served clients and buildings	
BACC – Sofia	- Number of buildings: 47 - Number of households: 1,155 - Number of completed projects*: 43 - Number of projects under implementation**: 2
Probuzhdenie EOOD – Burgas	- Number of buildings: 0 - Number of households: 0 - Number of completed projects: 0 - Number of projects under implementation: 0 The deviations are primarily due to delays in launching pilot projects, caused by the absence of national renovation programmes targeting single-family houses.
Energy Saving EOOD – Stara Zagora	- Number of buildings: 54 - Number of households: 3075 - Number of completed projects: 15 - Number of projects under implementation: 0
BRCC - Ruse	- Number of buildings: 7 - Number of households: 7 - Number of completed projects: 3. The projects concern the installation of RES systems for single-family houses - Number of projects under implementation: 0
EVN TP – Plovdiv	- Number of buildings: 23 - Number of households: 23 - Number of completed projects: 23 The projects concern the installation of RES systems for single-family houses - Number of projects under implementation: 0
Municipality of Gabrovo	- Number of buildings: 16 - Number of households: 100 - Number of completed projects: 15 - Number of projects under implementation: 0

* approved for financing; ** in a preparation phase to apply for financing

The data from the six OSSs show significant variation in the number of served clients, buildings and completed projects. This is influenced not only by the presence or absence of active financing programmes, but also by the strength of partnerships with local authorities, as well as by the prior experience and maturity of each OSS. Centres that work in close cooperation with municipalities and have accumulated practical experience tend to achieve higher volumes of activity and serve a broader range of users.

BACC – Sofia reports the highest results, including 47 served buildings, 1155 households and 43 completed projects, representing overperformance (the project proposal anticipated 30 completed projects). This is due to several factors: an already established network of partners, proactive marketing and extensive on-the-ground engagement.

Energy Saving – Stara Zagora demonstrates a substantial volume of serviced buildings and households (54 buildings; 3 075 households) and a total of 15 completed projects at the time of assessment. This positions the centre among the most active OSS in the project, showing clear progress in both client servicing and the execution of real renovation projects.

Probuzhdenie – Burgas did not report serviced buildings or completed projects. This is directly linked to the absence of national programmes targeting single-family homes, which are the primary focus of this OSS. As a result, demand remains structurally low regardless of the centre's internal capacity.

BRCC – Ruse reports 7 serviced buildings and 3 completed projects related to the installation of RES systems for single-family houses. The lower volumes reflect the fact that the OSS in Ruse is a newcomer to the niche of integrated energy efficiency services. This niche requires broad expertise, well-developed partnerships, trust and visibility among homeowners—elements that take time to build. As an emerging OSS, BRCC is still developing capacity and recognition at the local level, which naturally results in a slower accumulation of clients and completed projects.

EVN TP – Plovdiv reports 23 serviced buildings and 23 completed projects for the installation of RES systems in single-family houses. These results can be largely attributed to EVN's strong reputation in the region and the longstanding trust established with its customers, many of whom are district heating clients. As part of a large and well-known energy company, the OSS operates in an environment where

trust is already established. This reduces client hesitation, accelerates decision-making and facilitates engagement, as users perceive the company as a reliable and professional partner. In addition, the professionalism and technical expertise accumulated within EVN over the years enable swift and high-quality implementation of projects. Strong internal technical capacity and well-established processes allow the OSS to deliver consistent, reliable and comprehensive integrated services.

The results of Municipality of Gabrovo (16 serviced buildings, over 100 households and 15 completed projects) should be viewed considering that OSS functions are carried out within the municipal administration and represent an additional responsibility beyond its core mandates. This demonstrates strong administrative commitment and significant development potential that could be further realised with the availability of national financing programmes and operational financial mechanisms.

Active partnerships	
BACC – Sofia	- with local authorities: 5 - with local professionals: 2 - with banks: 0
Probuzhdenie EOOD – Burgas	- with local authorities: 1 - with local professionals: 0 - with banks: 0
Energy Saving EOOD – Stara Zagora	- with local authorities: 3 - with local professionals: 4 - with banks: 0
BRCC - Ruse	- with local authorities: 2 - with local professionals: 21 - with banks: 4
EVN TP - Plovdiv	- with local authorities: 3 - with local professionals: 7 - with banks: 0
Municipality of Gabrovo	- with local authorities: 1 - with local professionals: 6 - with banks: 1

The data on active partnerships show clear differences between OSSs, shaped by the local context, the maturity of each OSS, the strength of local professional networks, and the traditionally established relationships between institutions and businesses.

1. Partnerships with local authorities: OSSs with stronger institutional presence or historically established cooperation with municipalities—such as BACC (Sofia), EVN TP (Plovdiv), and Energy Saving (Stara Zagora)—report a higher number of partnerships. These partnerships ensure access to communication channels and joint initiatives, which are essential for the effective functioning of the OSS model.
2. Partnerships with local professionals: BRCC– Ruse reports the highest number of partnerships (21), which stems from its business model and its role as a local ecosystem hub. The Municipality of Gabrovo has established six partnerships with professionals in the fields of energy audits, energy efficiency, RES installers, as well as construction firms and suppliers of insulation materials.
3. Partnerships with banks: At present, five of the six OSS centres do not have partnerships with banks, as the market lacks specialised banking products for residential energy renovation. This is a systemic constraint beyond the control of the OSS. The exception is BRCC– Ruse, which has four partnerships with banks. These derive from existing cooperation in the sphere of business projects, where co-financing is mandatory. Therefore, they are not related to residential renovation and do not indicate the availability of financial products for households.

Cost structure	
BACC – Sofia	The actual practice of the OSSs confirm the types of costs foreseen in the Business plans.
Probuzhdenie EOOD – Burgas	
Energy Saving EOOD – Stara Zagora	
BRCC - Ruse	
EVN TP - Plovdiv	
Municipality of Gabrovo	

At this stage, all OSSs confirm that the types of costs outlined in the initial Business plans correspond to the operational costs actually incurred. The main categories—personnel, communication, technical support, external experts, administrative expenses, etc.—are materialising as planned.

However, several important considerations must be noted:

- the absence of financial data on actual cost values prevents any quantitative assessment.
- operating under a project-based regime results in lower or differently distributed costs compared to what would be expected in a future market environment.
- for some OSSs (e.g., Burgas), actual cost patterns have not yet fully formed due to limited activity levels.
- in BRCC – Ruse, costs are shared between the OSS and the external network of trusted partners, reflecting the specific business model.
- In the Municipality of Gabrovo, remuneration-related costs are covered jointly by the municipal budget and the project, consistent with its administrative structure.

As a result, the current assessment is limited to the structural level (types of costs) and does not allow conclusions regarding the adequacy of the cost amounts or the long-term financial sustainability of the OSSs.

Revenue structure	
BACC – Sofia	The actual sources of revenue correspond to those outlined in the Business plan. Within the piloting phase, revenues are generated primarily through the SHEERenovPlus project. Homeowners' associations pay 5% of the cost of consultancy services and the energy audit, as well as 100% of the cost of the technical inspection.
Probuzhdenie EOOD – Burgas	There is insufficient financial information for the period. At present, complete revenue data are not available, as part of the planned revenues relates to future consultations and projects still under negotiation.
Energy Saving EOOD – Stara Zagora	Actual revenues originate from sources different from those initially planned. Within the SHEERenovPlus project, the OSS receives partial revenue from consultancy services for the energy efficiency audit, technical inspection and technical passport, which are paid by the homeowners' associations. Consultations are provided free of charge if no contract is signed, and in such cases the costs are covered by the company's regular commercial activity.
BRCC - Ruse	The actual sources of revenue correspond to the Business plan. According to the Business plan, the OSS does not generate direct income from client services. Payments for expert services go directly to the trusted partners (the external expert network). The OSS itself provides free initial consultation and refers clients to the appropriate specialists. Its revenues come from the membership fees paid to BRCC (earmarked for OSS maintenance) and, in the future, may include advertising income and grant-based funding (national and European programmes).
EVN TP - Plovdiv	The actual sources of revenue correspond to those foreseen in the Business plan.
Municipality of Gabrovo	No revenues are generated, due to the public nature of the organisational and functional setup.

The revenue structure also confirms the initial expectations, as in most OSSs the types of revenue sources correspond to those outlined in the Business plans. However, the overall picture indicates a strong dependence on project-based funding and limited generation of market-based income:

- BACC – Sofia generates revenue in line with the Business plan model: partial contributions from homeowners' associations (5% for consultancy services and the energy audit; 100% for the technical inspection), complemented by project funding through SHEERenovPlus.
- Energy Saving follows a similar model, but a large share of consultations remain unpaid when no service contract is signed—these costs are absorbed by the company's regular commercial activity.
- BRCC operates under a specific model in which revenues do not come from clients but from BRCC membership fees and future opportunities for advertising and grant-based funding.
- EVN TP aligns fully with the Business plan and generates revenue according to the planned model.
- Municipality of Gabrovo, as a municipal administration, cannot charge citizens for OSS services and therefore does not generate its own revenue. The model relies entirely on project-based funding, and its sustainability in a market environment is feasible only if adequate mechanisms are introduced to partially or fully cover the operational costs associated with OSS functions.

Conclusion: At this stage, revenues can be assessed only in terms of their types, but not in terms of volume, due to the absence of financial data and the early project-based nature of OSSs operations.

Communications and marketing	
BACC – Sofia	Information campaigns and promotional events have been carried out to raise awareness of the OSSs services. The planned coverage of target groups has not been fully achieved—financial institutions have not been reached due to the absence of suitable financial products for homeowners’ associations. Opportunities for improvement include: 1. Targeted presence in neighbourhoods or districts where buildings have already been renovated; 2. Direct client engagement once appropriate financing instruments become available on the market; 3. Organising more demonstration meetings; 4. Developing a network of “ambassadors” — satisfied homeowners who can share their experience.
Probuzhdenie EOOD – Burgas	
Energy Saving EOOD – Stara Zagora	
BRCC - Ruse	
Municipality of Gabrovo	
EVN TP Plovdiv	Regular information campaigns and promotional events are held to raise awareness of OSS services. In recent months, targeted communication activities have been implemented on Facebook and LinkedIn, presenting the range of services and consultation topics. The posts are primarily aimed at owners of single-family houses.

The communication activity of most OSS centres (Sofia, Burgas, Stara Zagora, Ruse) is at a similar level. Basic activities are implemented—information meetings, local outreach, communication with homeowners’ associations—but their overall reach remains limited due to low demand and the absence of concrete incentives for homeowners. EVN TP – Plovdiv stands out from the other OSSs thanks to its established corporate communication infrastructure, which enables more structured and regular social media activities targeting relevant user groups.

Key challenges remain:

- Increasing the active promotion of the digital platform among homeowners;
- Tailoring communication according to housing stock type (multi-family vs. single-family buildings);
- Organising more demonstration meetings in areas with completed projects;
- Building a network of “ambassadors” — homeowners with positive renovation experience;
- Conducting more systematic surveys among potential clients to identify needs and barriers.

In relation to the project indicators

Indicator	Planned for all OSSs	Achieved					
		BACC – Sofia	Probuzhdenie EOOD – Burgas	Energy Saving EOOD – Stara Zagora	BRCC – Ruse	EVN TP – Plovdiv	Municipality of Gabrovo
Local trusted professionals included in the Platform databasee	60	2	0	0	0	0	0
Matching individual projects to available financing schemes	100	43	0	15	3	23	15
Number of completed satisfaction surveys with positive feedback	90	42	0	11	3	28	0
OSS experts prepared to offer integrated energy efficiency services	24	5	3	4	4	8	3
Local stakeholders' professionals with improved knowledge and capacity to perform better quality services**	120	44	68	18	30	32	5
Trained municipal experts***	20	33	0	2	3	3	6
Concluded partnership agreements with the local authorities (municipalities/Sofia districts) for cooperation	5	5	0	0	0	0	NA

*** The trained local professionals and municipal staff are the result of joint training sessions delivered by all partners (OSS). As a consequence, the same trainees have been reported by more than one OSS.

The achievement of key project indicators should be interpreted in the context of the fact that approximately one year remains until the end of the project—a period during which the OSSs are expected to fully deploy the digital platform and the integrated services. At the same time, the announcement of the second phase of the National Energy Efficiency Programme and the launch of the National Decarbonisation Fund are anticipated. These two factors will directly influence the feasibility of meeting the project indicators in the remaining period.

1. Local trusted professionals included in the Platform database

The indicator remains significantly below the planned values. This is understandable, as the platform was introduced relatively recently. With the remaining year and a targeted engagement campaign, this indicator has strong potential for improvement.

2. Individual projects matched to available financing schemes

Progress has been reported in Sofia, Plovdiv, Stara Zagora and Gabrovo, whereas in Ruse and Burgas the indicator remains naturally low. This indicator is directly dependent on the availability of financing programmes. The expected launch of the second phase of the National Programme and the operationalisation of the Decarbonisation Fund may create favourable conditions for accelerated achievement of this indicator during the final year.

3. Completed satisfaction surveys with positive feedback

The indicator reflects the actual number of client interactions during the first implementation period.

With the deployment of the platform in the coming year, feedback collection is expected to become automated, making it easier for users and increasing the number of completed surveys. Integrating the survey process into the standard user journey within the platform is expected to enhance both engagement and the quality of the structured satisfaction data collected.

4. OSS experts trained to offer integrated services

This indicator has been fully achieved, as the training was centralised and delivered to all partners.

5. Local professionals and municipal staff with improved capacity

The values are high but should be interpreted with caution, as they result from joint training sessions and include duplicated reporting by multiple partners.

What is important is that local-level capacity is now available, forming a strong foundation for implementation once new programmes are announced.

6. Partnership agreements with local authorities

The indicator has been achieved primarily by BACC – Sofia. For the remaining OSS centres, there is an opportunity in the coming months to formalise existing collaboration with municipalities, especially if the second phase of the national programme is launched, as such programmes typically require institutional cooperation.

FINDINGS AND RECOMMENDATIONS

Findings from the individual Business plans	
BACC – Sofia	The activities of BACC OSS largely correspond to the provisions of the Business plan. The organisational structure is established and functioning effectively, providing a solid basis for developing partnerships and fully utilising the digital platform. The services offered remain fully relevant to market needs, and the impact is already visible through actual consultations and launched renovation projects. This is expected to further strengthen homeowner interest and trust in the renovation process. The main challenges for sustainability relate to the transition towards a market-based model and the need to ensure a stable stream of own-source revenue once project funding ends. In addition, market sustainability requires continuity and predictability of public support—avoiding so-called stop-and-go funding cycles, which lead to capacity loss, demotivation of homeowners, and disruption of accumulated progress.
Probuzhdenie EOOD – Burgas	The activities of the OSS largely correspond to the Business plan. The organisational structure is in place, providing conditions for partnership building and effective use of the digital platform. The services offered remain relevant to market needs. The main sustainability challenges relate to the transition to a market model and the need to ensure a stable flow of own-source revenue after the end of project funding.
Energy Saving EOOD – Stara Zagora	The activities of the OSS in Stara Zagora align closely with the Business plan. The organisational structure is established and functioning effectively, partnerships can be further developed, and the digital platform can be fully utilised. The services offered remain relevant to the market, and the impact is already visible through consultations and initiated renovation projects. Sustainability challenges are linked to the transition to a market-based model and the need for a stable revenue stream post-project. For market sustainability, public support (subsidies, national programmes, financing instruments) must be continuous and predictable. Interruptions in funding undermine momentum, create uncertainty, and impede sustainable market development by leading to: • loss of capacity (firms downsize, stop investing, lose specialists); • demotivation of homeowners (uncertainty causes withdrawal or delay); • disruption of accumulated progress (processes collapse, forcing the market to “restart” repeatedly).

BRCC - Ruse	No significant shortcomings are observed in the organisation and management of the OSS. However, there is a need for additional promotion of the digital platform and its large-scale adoption. Client engagement should be further developed. Existing partnerships are extensive and well-established, but will need to be strengthened to ensure long-term sustainability. Communications and marketing activities are satisfactory, but continued efforts are necessary.
EVN TP - Plovdiv	The OSS operates fully in line with the Business plan, with a complete organisational structure and experts performing all planned activities. No significant gaps have been identified; potential improvements relate mainly to future development and optimisation. The digital platform has been developed according to the technical specifications and is undergoing testing, with active user deployment still pending. A total of 23 projects have been completed—eight more than planned, and more than 6,500 customers have been informed onsite about OSS services. Partnerships with municipalities and local professionals function effectively, despite the absence of engaged banking institutions. The structure of revenues and expenditures fully aligns with the Business Plan. Communication activities have been actively implemented through social media, events and information days. However, the planned coverage of target groups has been only partially achieved, requiring broader promotion of the digital platform, expanded partnerships and stronger focus on end-users. Forthcoming initiatives, including “Energy Efficiency Days”, are expected to enhance audience engagement and strengthen the OSS’s public presence.
Municipality of Gabrovo	The organisational structure is established and functions effectively, supported by the Administrative Service Centre and external experts. Consultancy activities are delivered despite external constraints—delayed national programmes, unpredictable funding instruments, and the absence of banking products. Nevertheless, citizen interest remains relatively stable, particularly in cases where 100% grant support is available. However, the sustainability of the model remains strongly dependent on the availability of public funding and the development of financial instruments that would enable a market-oriented approach in the future.

Based on the mid-term evaluation, it can be concluded that the activities of the OSSs largely correspond to their Business plans, with organisational structures established and functioning effectively. All OSSs demonstrate clear progress in implementing the integrated service model and in developing partnerships, although the degree of progress varies across centres.

BACC OSS (Sofia) and Energy Saving OSS (Stara Zagora) show a high level of advancement due to their more mature organisational structures, strong partnerships with local authorities and significant volumes of serviced clients. In Plovdiv, results considerably exceed the planned values, driven by the high level of trust in EVN, broad access to clients and effective communication campaigns.

The lower performance values observed in BRCC OSS (Ruse) and Probuzhdenie OSS (Burgas) have different explanations, linked both to their stage of development and to their operational model. In Ruse, results should be interpreted in the context of a business model that is new to the organisation and in a local market where the OSS concept itself is still emerging. Ruse operates with a distinct model focused primarily on acting as a coordination hub rather than a direct provider of all services. This approach requires time to build recognition and establish a steady client flow. The OSS in Burgas has capacity and experience but operates in a very narrow market segment—single-family houses—for which no active financing mechanism currently exists.

For all OSSs, demand for OSSs services is directly dependent on the availability of financing programmes. The absence of specialised banking products and the lack of support for energy-poor households represent systemic barriers.

The digital platform has been introduced, but is not yet widely used. Its promotion and full deployment in the remaining project period will be essential for improving OSS operational efficiency, strengthening client communication and automating processes, including the collection of customer satisfaction feedback.

The sustainability of the OSS model remains a core challenge for all centres. Revenues from own services are limited, and dependence on project-based funding remains high. The transition to a market-based model will require detailed costing of services, identification of sustainable revenue sources and conditions that support a continuous flow of clients.

Market stability depends heavily on predictable state policy. Consistent and long-term public support is critical, and stop-and-go funding cycles must be avoided, as they lead to capacity loss, demotivation among homeowners and disruption of accumulated momentum.

Recommendations from the individual Business plans	
BACC – Sofia	- Promotion of the digital platform and its effective deployment among target users. - Promotion of the partnership-establishment module. - Development of a more in-depth and detailed cost analysis for delivering the various services (organisational, technical, financial, legal), as well as an assessment of the possible sources for covering these costs – own revenues, project funding and others. This analysis should be included in the updated version of the Business plan and serve as a basis for determining the economic and financial sustainability of the BACC OSS.
Probuzhdenie EOOD – Burgas	- Promotion of the digital platform and its effective deployment among target users. - Promotion of the partnership-establishment module. - To explore the possibility of introducing fees for consultations and technical assessments as a sustainable source of own revenue. - To continue organising group consultations and events with municipal structures to increase awareness of renovation opportunities.
Energy Saving EOOD – Stara Zagora	- Promotion of the digital platform and its effective deployment among target users. - Promotion of the partnership-establishment module. - To develop a model for establishment of an Energy Community in already renovated buildings, as energy communities can become a strategic element that transforms renovation into a sustainable energy model rather than a one-off measure. - To develop a more detailed and comprehensive analysis of the costs for providing the individual services (organisational, technical, financial, legal), as well as of the potential sources for covering these costs – own revenues, project funding and others. This analysis should be incorporated into the updated Business Plan and serve as a

	foundation for assessing the economic and financial sustainability of the OSS.
BRCC - Ruse	4. Promotion of the digital platform and its effective deployment among target users. 5. Promotion of the partnership-establishment module. - Development of a more in-depth and detailed cost analysis for delivering the various services (organisational, technical, financial, legal), as well as an assessment of the possible sources for covering these costs – own revenues, project funding and others. This analysis should be included in the updated version of the Business plan and serve as a basis for determining the economic and financial sustainability of the BRCC OSS.
EVN TP Plovdiv	Based on the progress achieved and the challenges identified, several key recommendations are formulated: - Broaden the promotion and active deployment of the digital platform to facilitate communication, management and coordination among stakeholders in the process. - Expand partnerships with municipalities and local professionals to reach a larger number of users and deliver a wider range of integrated services. - Enhance the Business Plan through a more detailed financial analysis and scenarios for sustainable market development. - Actively seek engagement from financial institutions, given the lack of appropriate banking products identified on the market.
Municipality of Gabrovo	- Introduce the digital platform into active use by citizens and partners. - Expand partnerships with local professionals to ensure fuller coverage of technical and administrative services. - Strengthen communication activities with clear messages that compensate for national-level informational uncertainty.

	- Prepare templates, procedures and databases in advance to allow rapid response when new programmes open. - Develop a sustainability plan for the post-project period, including potential models for combined or partial market financing.
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The individual recommendations formulated by the six OSSs clearly outline similar areas for improvement, regardless of their operational model or degree of progress. The overall picture reveals three dominant themes: (1) the need for active promotion and practical deployment of the platform, (2) the need to expand and strengthen partnerships, and (3) the requirement for an in-depth financial analysis and sustainability modelling.

Digital Platform

All OSS centres – including Plovdiv, despite its more advanced communication infrastructure – emphasise the need for broader promotion and full-scale implementation of the Platform. This is expected, as the Platform:

- is still a new tool;
- is not yet widely recognised by homeowners and professionals;
- will play a key role in the remaining project year, especially for automated data collection and satisfaction monitoring.

The shared recommendation is that the Platform should become the primary channel for communication, service requests, partnerships and monitoring.

Partnerships – a horizontal need across all OSSs

All centres report the necessity to strengthen and expand partnerships – with municipalities, local professionals, and (in the longer term) financial institutions.

This is understandable, because:

- partnerships correlate directly with the volume of serviced clients;
- municipalities are the entry point to homeowners;
- professionals are the actual implementers of technical, legal and administrative services;
- banks will play a role in future blended models involving credit-based financing.

The emphasis is on operational partnerships rather than formal ones, which is a realistic approach for the remaining project period.

Financial Sustainability

Five of the six OSS centres (Sofia, Stara Zagora, Ruse, Plovdiv and Gabrovo) highlight the need for a detailed analysis of operational costs and revenue streams that would build upon the initial business plans. Such analysis is essential for assessing long-term sustainability and should be integrated into the revised business plans.

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