



LIFE project BAOBAP: support services for renovation projects of small municipalities

Report on pilot projects

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Website: baobap.fr

LinkedIn: BAOBAP



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ABSTRACT / EXECUTIVE SUMMARY

Context

Three years ago, BAPAURA first sought to create a **Regional Network of One Stop Shop (OSS)** services that would increase the opportunities of small and mid-size municipalities to renovate their buildings without passing on the opportunity to gain on significant energy savings and reduce their carbon footprint. These goals preceded the health crisis, its subsequent economic crisis and the energy crisis which they all have reiterated the need for small municipalities to find solutions to reduce their energy consumption and finance their investments.

The BAPAURA project has exposed additional obstacles to renovation in small municipalities in the Auvergne-Rhône-Alpes region that will be addressed within BAOBAP.

BAPAURA was able to develop a regional support service that:

- Formalized the offer to municipalities to help them in the energy renovation of their public buildings.
- Established a strong regional coordination (managed by ADEME), a service close to the local support services, organization of workshops/trainings according to the needs, network meetings (in webinars or face-to-face), shared and evolving toolbox
- Structured a network with tools: shared collaborative space, social networks with interactions between partners (which allows to highlight the actions of other partners).

BAPAURA also encouraged the support organizations to create relations with the funders of the renovation projects (public entities, banks, ...). Indeed, there are multiple sources of funding that can be mobilized for a project, and the role of support organizations is to help the municipality obtain the best financing/funding options for the project.

The project BAOBAP has three main objectives:

- Establish a Regional Renovation Support Package for small and mid-size municipalities in the regions of Auvergne Rhône-Alpes and Occitanie and 3 additional regions selected through the dissemination of the project (twinning)

The "establishment" part of the BAOBAP project consists in assisting the development of formalized support services for about thirty associated support organizations through a toolbox appropriation process and personalized support.

- Disseminate the tools and models to support organizations at National and European level
- Implement six different innovative services, tested by six "pilot partners" during the project

The project will enhance the model and the toolkit with pilot testing of innovative service dimensions. Each innovation partner will experiment in depth with a new service dimension in order to make the support service fit for deployment, ensure its relevance and its capacity to be self-sustained over-time.

Methodology for the innovation projects

During the BAPAURA project, it became clear that certain phases, critical to the success of the project, needed to be explored in more depth, and that the support service offer needed to be expanded.

The current context (shortage of manpower, lack of materials, strong need to reduce energy consumption) has led some organizations to adapt their services.

One of the main lessons of BAPAURA is that **a service offer is more effective if the tools come from the needs identified on the field (bottom-up process)**.

We therefore launched a call for partners to experiment with innovative topics, which could not be addressed in the framework of BAPAURA, but which needed to be addressed to improve the energy renovation assistance service.

The pilot testing methodology started by the selection of the pilots. Each chosen organization is certified to have a running renovation support service. Each pilot disclosed the following information (the declarations of interest are available in the attachments):

- The local obstacles, context and the motivation of their testing
- The detailed method to be put in place, sub-steps of their pilot
- The number of municipalities or projects on which they will test their service, and the projects or municipalities already identified
- The tools that they aim to develop
- The budget required for the experimentation, including subcontracting needs
- The internal staff mobilized for the experimentation

The 6 partners organically identified 3 main topics to develop:

- **Decision-making support methodologies:** In BAPAURA, it became apparent that municipalities had little knowledge of their building stock and were not sufficiently equipped to choose which building to renovate, thus wasting valuable time, resources and not reaching planned energy savings. The SDE03 and the AGEDEN, partners of BAPAURA, wished to work on this subject in two different ways. The SDE03 wishes to establish a methodology to draft SPREM (Sustainable Public Real Estate Management) adapted to small municipalities. AGEDEN wishes to work on the programming phase and the precise definition of the needs of the municipalities. In times of material and manpower scarcity, it is necessary to concentrate efforts in the most efficient way possible.
- **User involvement in renovation projects:** A recurring issue is the lack of involvement of users in the planning of renovation projects, and that project owners are not very well trained on the subject of building renovations. SYANE and ALTE69 wish to work on methodologies for the integration of users in renovation projects, in order to create projects that are best adapted to their needs. Moreover, they wish to train and increase the competence of the users and municipal staff on the subject of the operation of the building, the adjustment of the controls, the in-use phase; allowing to improve the effective performance of the building after renovation.
- **All-inclusive renovation service:** The last group wishes to build an even more complete service to municipalities, with the aim to simplify their work as much as possible. The SIEL and SINGERLY wish to develop an all-inclusive offer, with technical, administrative and financial assistance. The SIEL wishes to develop a technical offer by proposing a project management service, enabling small municipalities to carry out ambitious and comprehensive renovation projects. The SIEL will couple this offer with an experiment on territorial sponsorship (financial), an innovative device that should allow mobilizing private funds for public renovation operations. SINGERLY will work on delegated project management, allowing the municipality to be relieved of a large part of the administrative procedures related to the renovation project. On the financial

side, it will work on inter-municipal intracting, a new financing method that gives municipalities access to very low-interest loans for renovation projects, thus facilitating project financing.

The table below summarizes the innovation projects:

	Decision of the municipality – selection of the project	Programming phase	Design phase	Works phase	Maintenance / life of the building
SDE03	Public real estate management adapted to small municipalities				
AGEDEN		Programming phase with focus on sufficiency			
SYANE		Methodology on User Management Assistance (with specifications to subcontract it)			
ALTE69		Methodology on User Management Assistance (done directly by ALTE69)			
SIGERLY		Technical assistance (commissioning) + financial assistance : Baty+			
SIEL-TE			Design phase done by SIEL (technical assistance) + experimentation of sponsorship to fund the projects		

Figure 1 : Experimentations

How it is going

Note: For all the projects, the tools used are not described in this document, but can be found in the report “List of the tools created by the innovation pilots”.

The project ends in August 2026; therefore, the document presents the advancement of the experimentations at the middle of the project. It will be updated and completed at the end of the project.

- **Decision making support methodologies: AREC Occitany and SDE03 projects**

Methodology of the experimentation

- **Benchmark**

During the benchmarking phase, exchanges with other organizations have helped identify key areas for improvement, as well as the main constraints that planning documents may face when applied to small municipalities. Following specific feedback from AREC Occitanie, the “Small Municipalities SDIE” (Schéma Directeur Immobilier Énergétique – Sustainable Public Real Estate Management) will be renamed CGIE (Conseil en Gestion Immobilière Énergétique – Energetic Asset Management Advice). This new terminology more accurately reflects the objectives of the Syndicate’s work while considering the capacities of the target municipalities. The document will take the form of a consultancy report rather than a tool requiring ongoing facilitation and updates.

- **Test on projects**

Meetings with various municipalities have confirmed interest among some and have also helped identify new municipalities willing to engage in the initiative. The SDE 03 manages a departmental network of energy managers operating within intermunicipal cooperation structures (EPCI). Through this network, the approach has been introduced, and outreach efforts have been conducted to recruit motivated municipalities. This collaborative effort with EPCIs could potentially lead to partnerships in the development of municipal CGIEs.

At this stage of the project, a framework for the support process is emerging, and a list of engaged municipalities is taking shape.

The pilot experimentation is currently underway with the municipality of Saint-Gérard-Le-Puy, serving as a test case to refine the methodology for supporting local authorities.

As part of this initiative:

- Technical assessments of municipal buildings have been conducted to evaluate their overall condition, energy performance, and renovation needs.
- Financial data, as well as information on regulatory diagnostics and inspections, have been collected from the municipality to establish a solid working foundation.
- To incorporate the usage dimension, questionnaires have been distributed to building users. These are currently being completed, providing essential insights into occupancy conditions, specific needs, and potential constraints.
- The drafting of summary reports has already begun, structuring initial findings and potential recommendations. Additionally, the schedule for upcoming meetings with the municipality is being finalized to ensure regular and collaborative project follow-up.

The ultimate goal is to define clear, well-supported intervention scenarios by April, enabling the municipality to consider concrete actions for the renovation and energy optimization of its built assets.

Service offered to the municipality

The service offered to the municipality is as follows:

- Step 1: Start of the mission

The SDE03 presents the mission to the municipality. The municipality signs an agreement. This agreement specifies the commitment required from the municipality at all stages of the project and explains the mission.

- Step 2: Inventory of assets

SDE03 visits all the municipality's buildings. It draws up building reports. These reports take into account technical aspects (energy efficiency, obsolescence, use of the building, etc.).

At the same time, the municipality is asked to provide information on regulatory and financial aspects.

The user aspect (suitability of the functional aspects of the buildings) is essential, but could not be dealt with in depth at this stage of the project (the method is currently being tested).

Based on these five aspects (energy, obsolescence, regulatory, financial, and use), SDE03 produces summary sheets.

- Step 3: Defining a strategy

During a workshop, elected officials use the approved summary sheets to establish a multi-year asset strategy (potentially including disposals, changes of use, renovations, etc.).

- Step 4: Drafting the document and returning it to the municipality

- **Efficiency on the design phase: AGEDEN project**

Methodology of the experimentation

- **Benchmark and training**

AGEDEN has made a training session about architectural programming phase; helping them define better the needs of the municipalities at the beginning of the projects. They work very closely with other entities working on User Management Assistance.

- **Test on projects**

AGEDEN has signed a convention with another public entity of the territory, to pool the competencies and co-construct a toolbox.

As for now, some projects have been identified to test this service (a sport facility in Pajay, a holiday resort that is unused). The experimentations are taking place in the first semester of 2025. They will serve for testing the tools and estimate the time needed to support the municipalities.

Service offered to the municipality

The service offered to the municipality is in 4 steps:

- Step1: On-site analysis and understanding of the projet by AGEDEN

The goal is to understand the goals and objectives of the renovation project, with the municipality. They help the municipality question in-depth their project (is there a need to upscale the project, to include the users in the process, what are the options, ...).

- Step 2: What are the stakes of the project

The goals is to identify and discuss the main issues of the project. The building is analysed with a "site quality radar" to identify better the weaknesses of the building than need to be taken care of. A workshop is conducted with the users.

- Step 3: Overview of the project

Together, AGEDEN, the municipality (elected representatives) and the users discuss about a common vision for the project.

- Step 4: Creation of a specifications document for the consultancy

The document to find a consultancy that will "do" the project is redacted. This document is made sure to include the users of the building and their requirements.

- **User involvement in renovation projects with two approaches: ALTE69 and SYANE projects**

For User Involvement in the project, we have two different approaches:

- ALTE69 offers to do the user involvement mission (workshops with users, ...) by themselves
- SYANE wants to create a specification document and a methodology to help municipalities recruit professionals “user assistance managers” for the renovation projects

Methodology of the experimentations

- **Benchmark and training**

ALTE69 and SYANE have been trained on User Management Assistance. They are also in a work group with various entities working on this topic.

- **Test on projects**

ALTE69 has initiated the support of various municipalities and buildings in the Rhône territory:

- **The “Orliénas” elementary school (COPAMO)**, currently in the drafting phase of the energy renovation program for its building. Awareness-raising and needs gathering workshops were carried out with student delegates and the teaching and technical teams. A questionnaire to identify users’ feeling was distributed, with the aim of raising certain needs in the project management selection program.
- **The “Vercors” and “Chat Perché” school groups in Saint Bonnet de Mure (CCEL)**, currently at the beginning of the design phase of the project management. Several workshops to collect needs were carried out with students, the teaching team and the canteen staff, in the presence of the project management referent (architect).
- **The “Belleville-en-Beaujolais” social center (CCSB)**, which has just been delivered after its renovation and extension. The objective of the support is to help users to get charge with the building and its systems in order to guarantee their comfort while achieving the energy performance targeted in the project.
- **The “Morancé” elementary school (CCBPD)**, which has just been delivered following its reconstruction and is the subject of several abuses of use. Similarly, the objective is to support users in getting to grips with the new building and its systems.

For the SYANE experimentation, projects have been recruited, and the first of the two (planned) trials is now underway.

Service offered to the municipality

To ensure the success of this experiment, ALTE 69 is focusing its work on two key phases:

- Design phase: involving users right from the emergence phase, and increasing the skills of project owners in renovation projects. More specifically, the aim is to propose a methodology and tools for identifying needs/usages in order to create a “typical path” for user involvement, depending on the type of building. This involves experimenting with the setting up of working groups between users, project owners and project managers at different phases of the project.

- Operating phase: to ensure that the control and programming systems are properly used by users and project managers. ALTE69 wants to raise awareness of the effective use of control/programming systems, in conjunction with users, and to ensure that maintenance/operating contracts are properly designed.

For the other experimentation, the SYANE wants to create a “specification document” to hire a professional “User Assistance Manager” to do the missions on the projects.

Initially, the specifications were drawn up in-house. Syane then joined forces with Réseau AMU France directly, in order to transcribe the desire for support in line with the needs of local authorities on the one hand, and the feasible and realistic missions of AMU professionals on the other. The idea was to bring together the service providers and Syane in order to co-construct suitable specifications. The specifications are now finalized and need to be tested on projects.

- **All-inclusive renovation service with commissioning and advantageous loans: SIGERLy project**

Methodology of the experimentations

- **Benchmark and training**

There was no need for specific benchmark during BAOBAP project. SIGERLy has been a BAPAURA project partner, with connection with multiple other energy syndicates through France, and had already a clear idea of what they wanted to experiment by the start of the project BAOBAP.

- **Test on projects**

The offer developed by SIGERLy as part of the BAOBAP project, BATy+, consists of a technical component (Commissioning), and a financial component (repayable advance). The financial component allows the municipalities to borrow money at a very low interest rate, through the SIGERLy.

To develop the BATy+ offer, SIGERLy teams proceeded in several stages.

Project stages:

- 1.Needs assessment (prior to the BAOBAP project):

Assessment of the number of potential buildings, diagnosis of communes' technical needs, assessment of financial investment requirements.

- 2.Bid preparation (before the launch and at the start of BAOBAP):

- Technical aspect: preparation of the specifications for the selection of the Technical Assistant (consultancy) doing commissioning mission, sourcing, awarding of the contract to select the Commissioning.consultancy

- Financial: sourcing of partner banks (public and private) to finance the repayable advance

- Organization: development of the organization, procedures and resources required to implement the BATy+ offer, development of the offer's economic model, drafting of agreement models, decision to launch the offer.

- 3.Launch of the tender:

- Technical component: Selection of the technical consultancy to carry out the technical missions (La Mediosphère).

- Financial: Selection of lending banks for the repayable advance (La Banque des Territoires, la Banque Postale)

- Organization: validation of the organization, procedures and resources, creation of a first version of the tools linked to the offer, call for applications from municipalities with a view to selecting energy renovation projects.

- 4.Testing the offer: (current stage, at the time of the BAOBAP interim report)

- Evaluation of candidate projects submitted by local authorities

- Selection of projects to be supported: 6 different buildings (schools, town hall, sports facilities, ...)
- Signature of BATy+ agreements between the selected project municipalities and SIGERLy
- Commissioning
- Payment of reimbursable advance
- BATy+ feedback

Service offered to the municipality

Stages of the BATy+ mission are the following:

- Step 1: launch of the service
- Kick-off meeting
- Establishment of a commissioning plan (1)

Commissioning plan: Plan that will record the tasks related to commissioning in all phases of the project, the sharing of responsibility among the various stakeholders for each of the tasks related to commissioning, the deliverables associated with each task, and the monitoring of the completion of these tasks.

- Step 2: up to the construction phase
- Meetings dedicated to commissioning led by the service provider
- Critical analysis of the documents submitted, in consultation with the project manager
- Regular updates to the commissioning plan
- Step 3: During the construction phase
- Verification of compliance with the requirements and technical criteria defined in the commissioning plan, as well as the implementation of equipment and materials on site.
- Reminder of the documents to be produced and deadlines for each project participant
- Spot checks and updating of the checklist
- Commissioning report
- Step 4: reception of the works phase
- Participation in the reception of the works meeting
- Overseeing coordination between contractors, manufacturers, project owners, and operators
- Step 5: Pre-operation phase (for 2 years)
- Ensuring and sustaining the use of the site and technical equipment by users and maintenance employees
- Monitoring the operating conditions of the site in relation to consumption and comfort objectives.
- Organization of operator training
- Organization of training for occupants

- Production of monitoring reports with recommendations for adjustments to settings

- **All-inclusive service with designs phase support and fundraising: SIEL project**

Methodology of the experimentations

- **Benchmark and training**

No specific training has been done by the SIEL on the subject. For the design phase, the experts (architects, etc.) were already in the SIEL team. For the fundraising experiment, the SIEL is accompanied by an expert consultant.

- **Test on projects**

The idea to offer to the municipalities a technical service through a design phase done entirely by the SIEL has been abandoned. Until March 2025, three experimental projects have been supported (two municipal houses and one school).

The implementation of the “designs phase” raised numerous questions from a legal point of view, notably concerning possible interactions with the law, the competitive field and obligations in terms of insurance and liability.

It became clear that these issues prevented the safe implementation of the experiment as initially planned and led SIEL-TE Loire's elected representatives to halt the experiment.

As for the financial part (testing of sponsorship), the experiment is still going on. An expert consultant has been recruited (Sponsorship & Territories). It helps the SIEL through 5 major items:

- Feasibility study:

- Help define the conditions for the development of territorial sponsorship in the region
- Evaluate the relevance of territorial philanthropy for building energy renovation
- Identify the human, technical and financial resources required to implement a territorial philanthropy strategy, etc...

- Definition of an internal private fundraising strategy:

- Help define an internal private fundraising strategy and propose an action plan.
- Support in implementing the strategy and action plan:

- Creation of tools:

- Develop practical tools, in particular a guide to territorial sponsorship. The first version of this guide is planned for Summer 2025.

- Experimentation:

- Support between two and four private fund-raising projects before the end of the project in September 2026.

- Evaluation and strategy consolidation:

- Assessment of the experiment
- Strategy consolidation

Service offered to the municipality

On the long term:

- SIEL-TE Loire does not wish to offer Design phase services directly to its municipalities
- Sponsorship is not intended to be offered for all projects.

The idea is to be able to identify projects for which sponsorship would be relevant, then to help municipalities set up their sponsorship projects. At this stage, several support scenarios have been identified, but none have been chosen by elected officials. At a minimum, local authorities will be offered a toolkit enabling them to conduct their own private fundraising campaigns. The other scenarios involve SIEL-TE Loire providing varying degrees of support.

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¹ Nature: R = Report, P = Prototype, D = Demonstrator, O = Other

² Dissemination level:

PU = Public

PP = Restricted to other programme participants (including the Commission Services)

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