Department for
Business, Energy
& Industrial Strategy

Appendix – Retrofit Demonstrator Programme: Project-level and Overarching Theories of Change

BEIS Research Paper Number 2021/55

October 2021

Project level Theories of Change (ToCs)

For the five projects still operating, the project-level ToC – in terms of intended steps and assumptions - has remained mostly constant across the programme; the one aspect of the original ToC that has ceased to be a core part of the scheme is the development of a project finance offer.

The ToC recognises the key assumptions around customers being motivated and able to engage, the website providing a route for customer journey progression, the benefits that can arise from local advocacy, and the proposition being attractive to some supply chain. In addition, many of the intended early steps of the ToC – service design, customer recruitment and progress, and coordinator recruitment – have been realised.

The ToC also accounts for the issues described in this chapter, reflecting that the later intended stages of the customer journey, particularly progession to retrofit and outcomes from that, have not been sufficiently evidenced to date. The ToC also reflects that a number of intended steps for supply chain recruitment remain unproven.

The assessment reflects that these assumptions and steps have not been proven / realised as yet; it allows for the fact that these could still be realised, albeit outside the intended timescales, as the ToC reflects the scheme within the programme funding period.

For the Homeworks project, whilst the ToC recognises that some early intended scheme design and development stages were realised, those around the customer journey and supply chain engagement were not, and many of the assumptions underpinning the scheme are unproven or disproven.

Overarching Theory of Change (ToC)

As well as per project theories, evidence across the evaluation has been used to create and update an overarching Theory of Change for the Demonstrator Programme. The structure of this overarching ToC – in particular the rationale underpinning it - has remained largely unchanged since the outset; the only significant adjustment, acknowledged in the diagram, is that the development of a finance offer has not been a priority for projects, despite it initially forming part of some original project offers / customer journeys.

Customers

For the intended stages of the ToC focused upon customers, across at least five of the individual projects there has been clear evidence of successful customer engagement and generally good customer satisfaction with the services provided. There has also been some customer progression to the later stages of the process, with some retrofit activity (though not all of it 'whole-house') taking place. However, partly due to the limited numbers, and partly the timing[1], of retrofit, as of March 2021 there was little to no robust evidence of:

- Post-works benefits being realised by customers (energy savings, bill savings, comfort gains etc.); even for the completed retrofit projects, it has generally been too soon for such outcomes to be properly measured.
- Post-works project stages and their anticipated effects (e.g. QA building customer trust and satisfaction).

In terms of the customer-related assumptions underpinning the ToC, many have been at least partially proven. The services offered by the pilots seem to have appealed to significant numbers of customers – albeit relatively few have progressed to action - and effective feedback mechanisms have been operating. There has also been some evidence that despite the pandemic, the ability of many able-to-pay customers to invest in works has been relatively unaffected. The assumptions around correct installation and its resultant benefits remain unproven.

Supply chain

For the intended stages of the ToC focused upon the supply chain (in particular installers), there has been some successful engagement (albeit not uniform across sub-sectors) and supplier willingness to engage in training has been particularly strong.

However, as for customers, it is the later stages and assumptions around retrofit works happening, and the knock-on effects of that on supplier training and engagement, that have yet

[1] Most retrofit has been delivered in Year 3, towards the end of the evaluation and funding period.

to be realised. In particular, the benefits to suppliers arising from collaboration and coordination (e.g. economies of scale) have not yet been realised.

Inputs and outcomes

The intended inputs to the programme and projects – the BEIS funding but also projects sharing insights and ideas – have been largely realised, albeit the level of funding was reduced in Year 2.

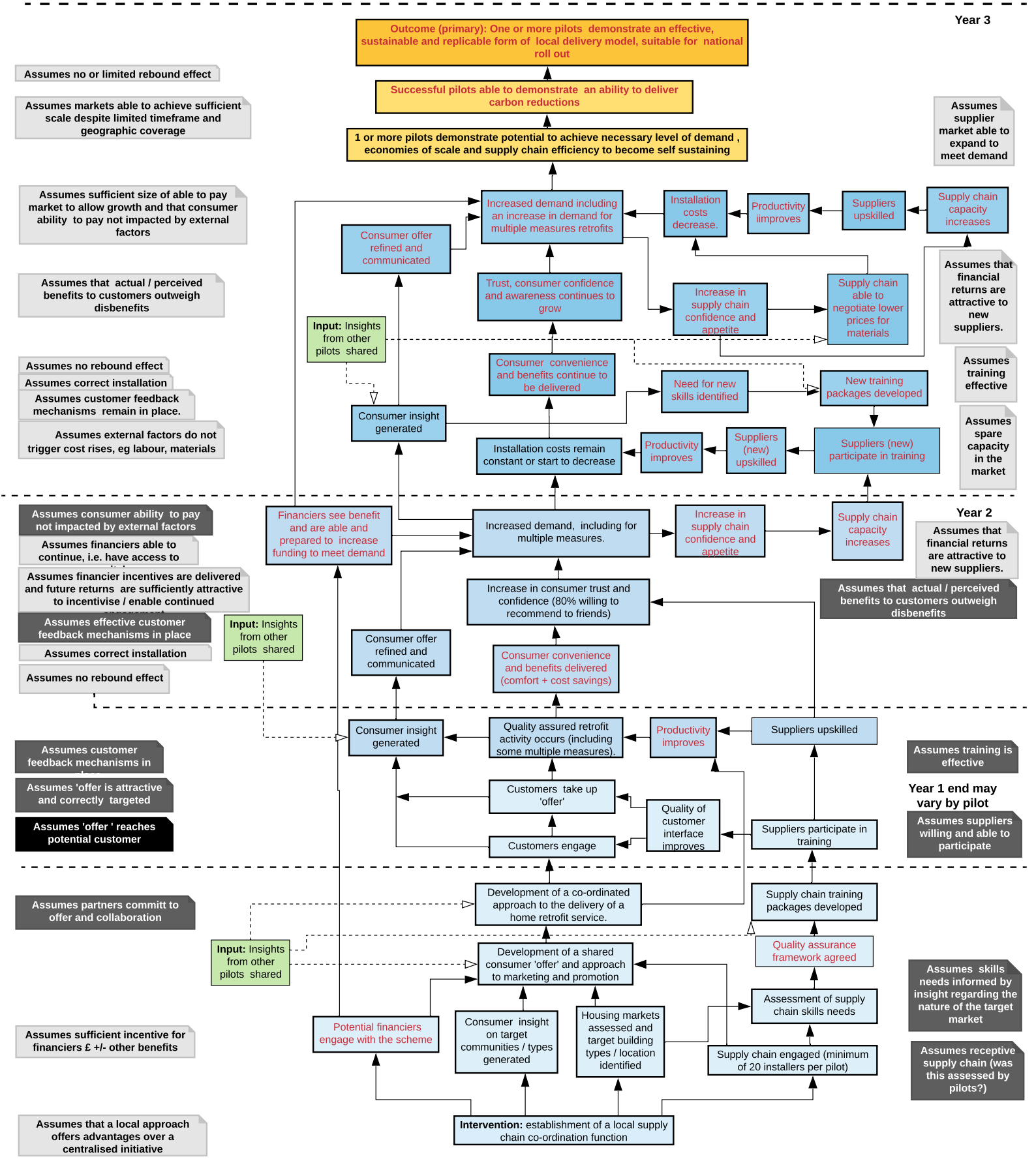
And despite the limited evidence of the later stages and assumptions in the ToC being realised, it is still fair to conclude that five projects demonstrate the potential to achieve the necessary level of demand, economies of scale and supply chain efficiency to become self-sustaining.

However, reflecting the limited evidence surrounding retrofit activity and its outcomes, it is not possible to say, to date, that the projects have clearly demonstrated the ability to deliver significant carbon reductions. Nor, moving to the primary goal of the programme, is it possible to state that any of the projects have – as yet - demonstrated an effective, sustainable and replicable form of local delivery model, suitable for national rollout.

This last point should be emphasised. Whilst they have been operating in some unhelpful conditions (described throughout the report), there have also been a number of potentially favourable ones which raise questions regarding project sustainability and replicability:

- Targeting latent demand of an engaged ‘early adopter’ market – what is the size of this group to sustain the existing projects (considering thousands of initial enquiries have resulted in less than one hundred retrofit projects) and how do projects move beyond this to tackle the mass market?
- Services subsidised by the grant, and continuing to be cross-subsidised in many cases by partners’ other activities – would this be feasible for less established organisations with new projects?
- Mainly economically strong, urban areas where there is a good level of supply chain, and householder and supply chain appetite to engage – would the same outcomes have been realised in smaller towns with a smaller supply chain and less strong economies?

Theory of Change for Local Supply Chain Demonstrators Phase 3 (V1.0) 14.4.2021



Inputs: Five million pounds, evenly split between 5 pilots, over a period of 3 years.

Rationale: The Clean Growth Strategy includes an aspiration for as many homes as possible to be EPC Band C by 2035. However, current levels of housing retrofit activity are low and mostly associated with Government subsidy scheme. The 'Building a Market for Energy Efficiency Call for Evidence' identified a number of barriers, both demand and supply side, to market growth and, to address the latter, suggested that Government consider funding third-party organisations as a means of improving co-ordination within, and ultimately growing, local supply chains dealing with the 'able to pay' (non-subsidised) domestic market. The Local Supply Chain Demonstrator Programme is intended to pilot this approach through different organisations, in different operational environment and through locally designed interventions.

KEY

- Assumption proven / supported
- Assumption partially proven / supported
- Assumption unproven (insufficient information to make a judgement)
- Assumption unsupported

KEY

'Gold' boxes describe the interventions target outcomes. Text in black indicates outcomes that have demonstrated in practice. Text in red indicates outcomes that have NOT yet been confirmed.

Blue boxes (all shades of blue) illustrate the logic chain / causal path. Text in black indicates those elements of the programme theory that have demonstrated in practice. Text in red indicates those parts of the programme theory that have NOT yet been confirmed.

Theory of Change: Ecofurb (London) supply chain pilot v0.1 (phase 3) 13.4.21

ASSUMPTIONS

- Assumes no or limited rebound effect
- Assumes markets able to achieve sufficient scale despite limited timeframe and geographic coverage
- Assumes sufficient size of able to pay market to allow growth
- Assumes that actual / perceived benefits to customers outweigh disbenefits
- Assumes scheme can become self-sustaining without subsidies
- Assumes supplier market able to expand to meet demand
- Assumes customer monitoring and feedback mechanisms remain in place.
- Assumes UI and UX able to develop sufficiently to enable whole house retrofit to be offered
- Assumes non-scale factors do not trigger cost rises, eg labour, materials
- Assumes that financial returns are attractive to new suppliers and that new retrofit coordinators coming in at this stage will be prepared to cover their own training costs
- Assumes some installations would not have happened in the absence of the pilot
- Assumes consumer ability to pay not impacted by external factors
- Assumes correct installation
- Assumes that customers decide to progress retrofit measures (within or outside Ecofurb project)
- Assumes that actual / perceived benefits to customers outweigh disbenefits
- Assumes supplier training, if it takes place, is effective
- Assumes customers motivated and able to engage
- Assumes increased demand and direct marketing attract more RetrofitWorks members

Outcome (BEIS and Ecofurb): Pilot demonstrate an effective, sustainable and replicable form of local delivery model, suitable for national roll out

Interim outcome: Pilot demonstrates ability to secure carbon reductions

Interim outcome: Pilot able to demonstrate the potential for establishing a self sustaining domestic retrofit business model

Year 3

- Financiers see benefit and are able and prepared to increase funding to meet demand
- Increased demand, more retrofitting activity occurs, including multi-measure or whole-house retrofit
- Installation costs decrease
- RetrofitWorks able to negotiate lower prices for materials
- Consumer offer refined and communicated
- Retrofit Coordinators enable improved supply chain coordination resulting in increased productivity
- Trust, consumer confidence and awareness continues to grow
- If customer research shows need for finance offer, finance offer developed and incorporated into offer
- Consumer insight generated
- Increase in supply chain confidence and appetite
- Consumer convenience and benefits continue to be delivered
- Supplier capacity and capability increases; new retrofit coordinators come on board who self-fund their training
- Whole house retrofit offered to customers
- Increased demand, more retrofitting activity occurs
- Increase in consumer trust and confidence (80% willing to recommend to friends)
- Further research on potential bulk purchases, with input from contractors
- Increase in supply chain confidence and appetite
- Consumer offer refined and communicated, UI and user experience (UX) are refined
- Consumer convenience and benefits delivered (comfort, cost savings, reduced carbon footprint)
- Provide signposting to existing finance offers
- Quality assured retrofit activity occurs (including some multi-measure)
- Volume of customer orders attracts new suppliers
- Retrofit Coordinators enable improved supply chain coordination and enhanced customer experience helping to generate demand
- Monitoring of those consumers that continue to interact with Ecofurb
- Customers accept Ecofurb quotes for measures managed by r/c
- Supply chain efficiency improves and customer experience is enhanced
- Supplier capacity and capability increases
- Quotes prepared, if requested
- Checks undertaken to ensure new RetrofitWorks members meet Quality Assurance requirements
- Further work with Ecology BS and financiers to determine how best to signpost or offer finance
- Whole House Assessment undertaken, if needed/requested
- Some consumers choose to progress retrofit measures outside Ecofurb
- Customer requests services from Ecofurb
- Retrofit Coordinator liaises with Retrofit Works installers to secure quotes and oversee delivery
- Direct marketing to attract more contractors to Ecofurb/RetrofitWorks
- Customer interacts with UI and develops initial basket of measures
- New Retrofit Coordinators trained and existing coordinators upskilled
- Launch of website and UI, with targeted marketing

Year 2

- Assumes increased demand necessitates need for more RetrofitWorks members
- Assumes new RetrofitWorks member installers don't need technical training
- Assumes customers are engaged by website to proceed to next step

- Input: Insights from other pilots shared
- UI developed and tested with target customer groups; Ecofurb customer journey refined; marketing plans developed; supply chain developed
- Retrofit Coordinator undertakes survey and liaises with installers to secure quotes
- Additional RetrofitWorks members recruited including suppliers (general contractors as well as retrofit experts) and new Retrofit Coordinators
- Trial customers, identified via enquiries, taken through customer journey from enquiry, through whole house assessment, through provision of RW quotes and (in Yr 3) to delivery of measures

- Assumes incentive for financiers £ +/- other benefits
- Assumes Retrofit Coordinator role is paid for out of the Ecofurb Plan and Spec cost to customer and installation fee to contractor.
- Assumes sufficient receptive suppliers available for early stages of pilot
- Assumes that a local approach offers advantages over a centralised initiative
- Assumes funding sufficient to cover costs in all Phases, in combination with funding contributions from Parity Projects

- Target market agreed , promotional messages and offers tested
- Options for bulk purchase of measures/services investigated
- Existing RetrofitWorks members (Retrofit Coordinators and installers) informed about pilot and encouraged to take part.
- Research conducted with financial organisations about potential finance offers for the pilot
- Consumer research generates customer insight for use in devloping 'offer'
- Analysis of building stock identifies priority homes for targeting
- Assessment of supply chain skills needs, availabililty and interest

Year 3

Intervention: development of existing local supply chain co-ordination function, moving from subsidised to non-subsidised retrofit market.

Inputs: BEIS Funding Yr 1 £190k, Yr2 £240k,Yr3 £370k. Plus knowledge sharing with other pilots. Use of existing RetrofitWorks delivery model and software and Retrofit Coordinator training package.

KEY

Blue boxes (all shades of blue) illustrate the logic chain / causal path.

Text in black indicates those elements of the programme theory that have been demonstrated in practice. Text in red indicates those parts of the programme theory that have NOT yet been confirmed.

KEY

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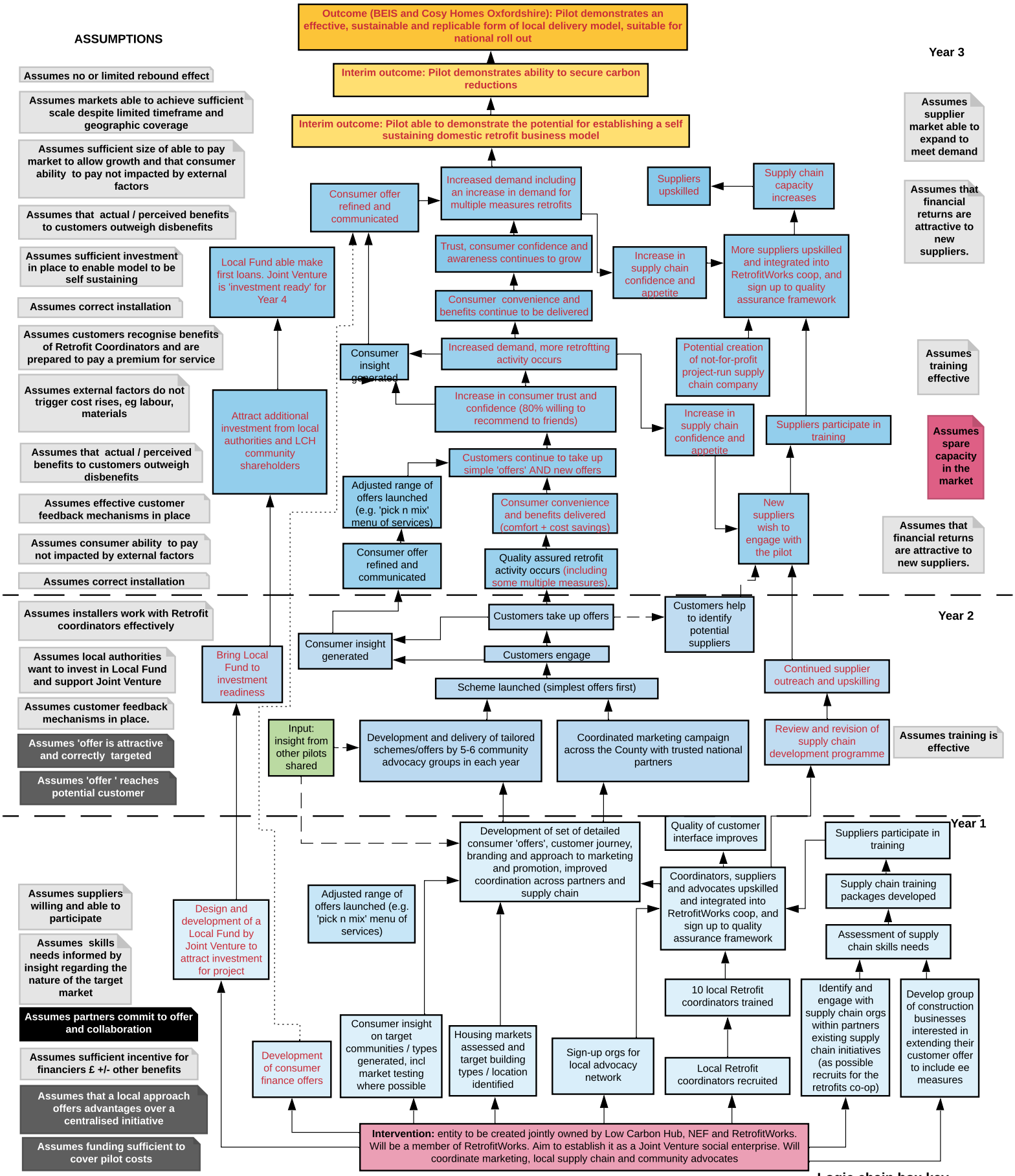
- Assumption unsupported

Rationale: The Clean Growth Strategy includes an aspiration for as many homes as possible to be EPC Band C by 2035. There is a recognition that, for a variety of reasons, domestic energy efficiency retroift activity is low outside of Government funded schemes. In 'Building a Market for Energy Efficiency Call for Evidence' it was suggested that Government consider funding third-party organisations as a means of providing support for local supply chain growth and coordination to effect greater uptake amongst the 'able to pay' market. The Retrofit Together pilot will build the whole house retrofit market in London through building on the existing RetrofitWorks model to offer tailored energy efficiency packages to property owners, with targeted marketing and possible bulk discounts, delivered by a quality assured local supply chain.

Theory of Change: Cosy Homes Oxfordshire supply chain pilot 21.4.21



Assumptions key

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- Assumption partially proven / supported
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- Assumption unsupported

Rationale: The Clean Growth Strategy includes an aspiration for as many homes as possible to be EPC Band C by 2035. The 'Building a Market for Energy Efficiency Call for Evidence' identified a number of barriers, both demand and supply side, to market growth and, to address the latter, suggested that Government consider funding third-party organisations as a means of improving co-ordination within, and ultimately growing, local supply chains dealing with the 'able to pay' (non-subsidised) domestic market. A local franchise model for RetrofitWorks will develop a simple trusted and sustainable model that can deliver on the Oxfordshire Energy Strategy target to retrofit 4000 houses per year by 2030. it will do this by combined the RetrofitWorks business model with a network of motivated communities, and existing local experience of delivery retrofit programmes and raising finance for community-led projects

Logic chain box key

'Gold' boxes describe the intervention's target outcomes. Text in black indicates outcomes that have demonstrated in practice. Text in red indicates outcomes that have NOT yet been confirmed.

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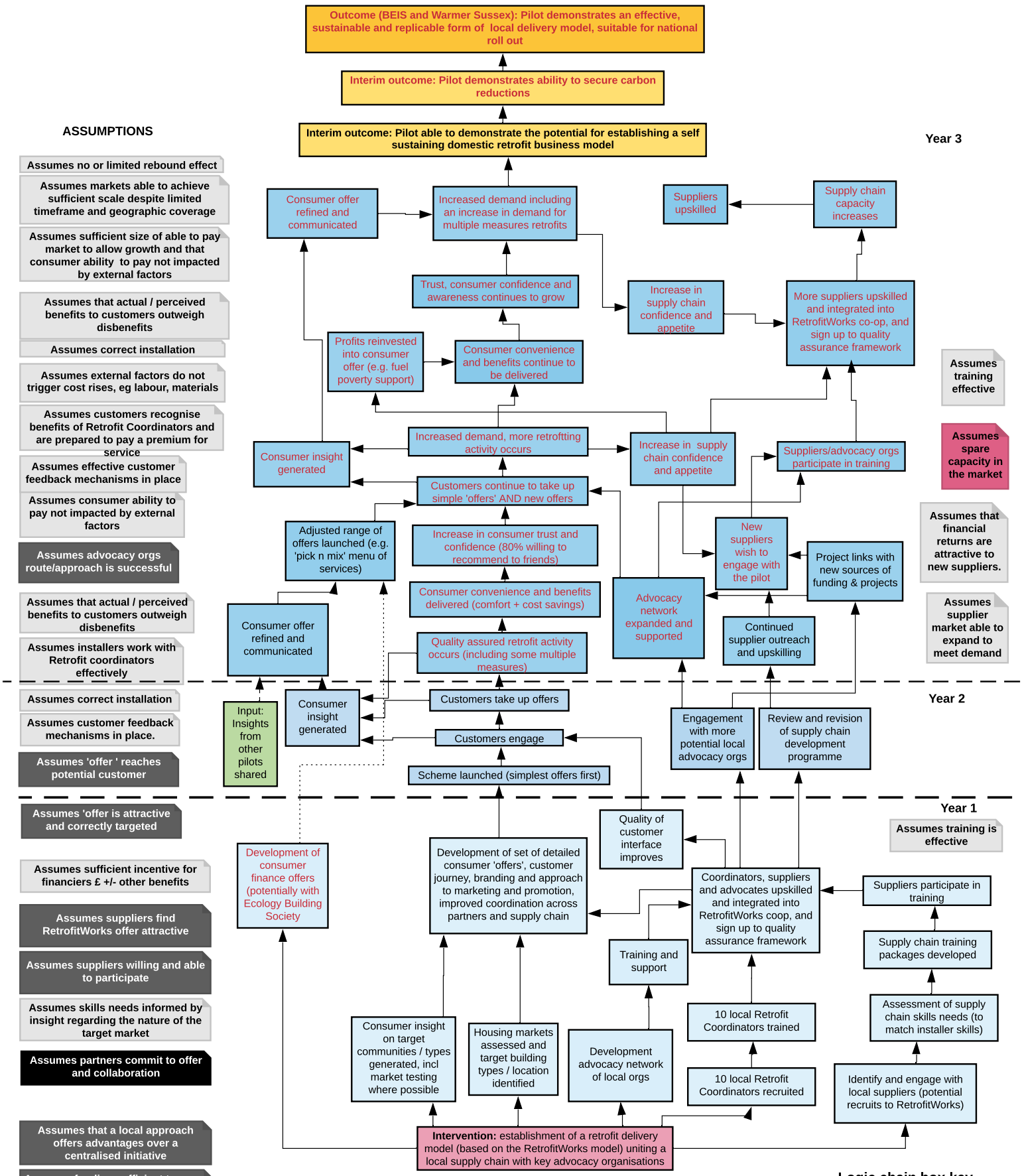
Theory of Change: Warmer Sussex supply chain pilot v1.0 21.4.21



ASSUMPTIONS

- Assumes no or limited rebound effect
- Assumes markets able to achieve sufficient scale despite limited timeframe and geographic coverage
- Assumes sufficient size of able to pay market to allow growth and that consumer ability to pay not impacted by external factors
- Assumes that actual / perceived benefits to customers outweigh disbenefits
- Assumes correct installation
- Assumes external factors do not trigger cost rises, eg labour, materials
- Assumes customers recognise benefits of Retrofit Coordinators and are prepared to pay a premium for service
- Assumes effective customer feedback mechanisms in place
- Assumes consumer ability to pay not impacted by external factors
- Assumes advocacy orgs route/approach is successful
- Assumes that actual / perceived benefits to customers outweigh disbenefits
- Assumes installers work with Retrofit coordinators effectively
- Assumes correct installation
- Assumes customer feedback mechanisms in place.
- Assumes 'offer ' reaches potential customer
- Assumes 'offer is attractive and correctly targeted
- Assumes sufficient incentive for financiers £ +/- other benefits
- Assumes suppliers find RetrofitWorks offer attractive
- Assumes suppliers willing and able to participate
- Assumes skills needs informed by insight regarding the nature of the target market
- Assumes partners commit to offer and collaboration
- Assumes that a local approach offers advantages over a centralised initiative
- Assumes funding sufficient to cover pilot costs

Assumptions key

- Assumption proven / supported
- Assumption partially proven / supported
- Assumption unproven (insufficient information to make a judgement)
- Assumption unsupported

Inputs: BEIS Yr1 £186k, Yr2 £240k, Yr3 tbc). RetrofitWorks existing delivery model. Citizens Advice energy advice network. In-kind resources from Hastings BC (from related projects).

Rationale: The Clean Growth Strategy includes an aspiration for as many homes as possible to be EPC Band C by 2035. The 'Building a Market for Energy Efficiency Call for Evidence' identified a number of barriers, both demand and supply side, to market growth and, to address the latter, suggested that Government consider funding third-party organisations as a means of improving co-ordination within, and ultimately growing, local supply chains dealing with the 'able to pay' (non-subsidised) domestic market. Warmer Sussex's retrofit delivery model will unite suppliers and key advocacy organisations under one umbrella. The aim is to unveil quick-to-launch retrofit offers than can generate a profit, to lay the ground for a longer-term approach that will meet local warmer homes energy targets. It will be based around RetrofitWorks, a 'realistic commercial model' that will support a technically expert, quality-assured and nationally scalable delivery model.

Logic chain box key

'Gold' boxes describe the intervention's target outcomes. Text in black indicates outcomes that have demonstrated in practice. Text in red indicates outcomes that have NOT yet been confirmed.

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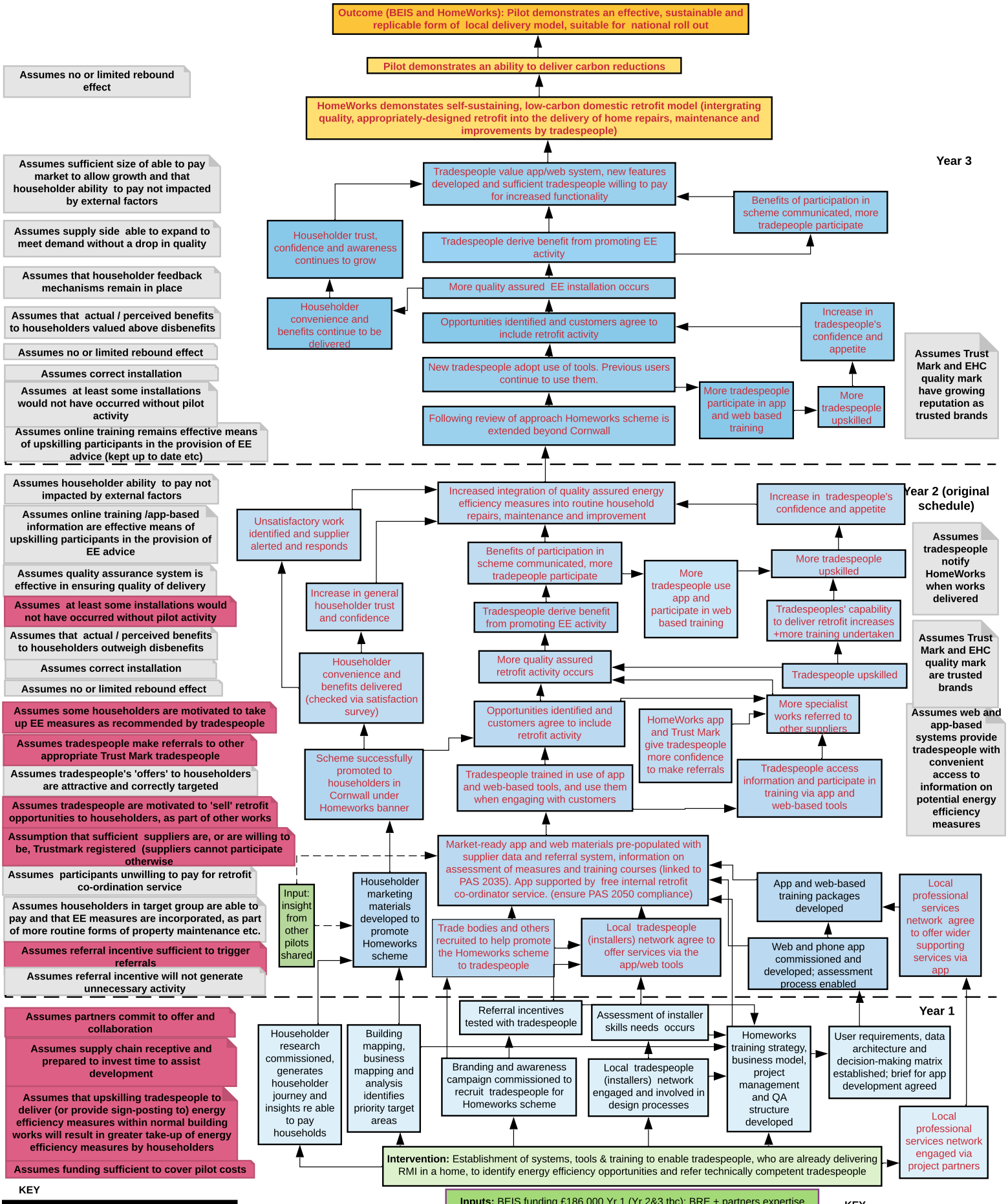
Theory of Change: HomeWorks (Cornwall) supply chain pilot (Phase 3 draft V1.0) 12.04.21



Theory of Change: Futureproof (South West) local supply chain pilot. Phase 3b (V2.3) 21.04.21

ASSUMPTIONS

- Assumes markets able to achieve sufficient scale despite limited timeframe and geographic coverage
- Assumes Futureproof business model is viable and sustainable (using combination of installer service fees and householder service fees, as appropriate)
- Assumes sufficient size of able to pay market to allow growth and that consumer ability to pay/install not impacted by external factors
- Assumes that actual / perceived benefits of measures outweigh disbenefits to consumers
- Assumes that quality issues identified through quality assurance can be addressed through training
- Assumes some rebound effect (mix of carbon savings and comfort taking/increased spend on other goods & services)
- Assumes correct installation (QA system works)
- Assumes customer feedback mechanisms remain in place (not yet fully in place)
- Assumes external factors do not trigger cost rises, eg labour, materials (GHG impact)
- Assumes planning permission for measures can be obtained where necessary
- Assumes that perceived benefit of using Futureproof justifies any consumer fees (untested)
- Assumes that Futureproof continues to be perceived as a trusted brand
- Assumes consumer ability to pay/install not impacted by external factors (Covid impact)
- Assumes satisfied Futureproof customers willing to participate in Green Open Homes, to market benefits to potential customers
- Assumes effective customer feedback mechanisms in place (not yet fully in place)
- Assumes correct installation (QA system works)
- Assumes that actual / perceived benefits of measures outweigh disbenefits to consumers
- Assumes some rebound effect (mix of carbon savings and comfort taking /increased spend)
- Assumes that increased access to trusted, quality suppliers increases take-up of EE measures by 'early adopters' within household repairs, maintenance, improvements (small numbers)
- Assumes that 'early adopters' develop trust in Futureproof brand and some customers choose to use retrofit coordinator/QA service (small numbers)
- Assumes that some customers use suppliers willing to engage with Futureproof and accept training
- Assumes scheme has capacity to assess needs (and surveys can be funded if needed) (small numbers)
- Assumes 'offer' is attractive and correctly targeted to 'early adopters' (partial - rise in enquiries from fuel poor because of Covid-19)
- Assumes partners commit to offer and to collaboration on marketing and co-ordination (no BCC Clerk of Works)
- Assumes Futureproof campaign can be effectively targeted at 'decision points' for home repairs, improvements and maintenance (no targeting)
- Assumes 'early adopters' are owner-occupiers that are motivated and able to incorporate energy-efficiency measures into household works, but held back by lack of trusted supplier (in some [illegible])
- Assumes 'early adopter' households are able to pay for energy efficiency measures within home repairs, maintenance and improvements (small numbers)
- Partnership able to access full range of necessary skills and expertise (not BCC Clerk of Works)
- Assumes that a bottom up approach more effective than top down
- Assumes funding sufficient to cover initial pilot costs, until Futureproof fee income becomes sustainable

By end of Year 3

Outcome (BEIS and Futureproof): Pilot demonstrates an effective, sustainable and replicable form of local delivery model, capable of being rolled out nationally

Interim outcome: Pilot demonstrates ability to secure carbon reductions

Interim outcome: Pilot able to demonstrate the potential for establishing a self sustaining domestic retrofit business model

Assumes Futureproof fees are acceptable and cost-effective for consumers and suppliers (supported for a few large companies but not most, smaller, Futureproof suppliers; not yet tested for consumers)

Assumes supplier market able to expand to meet demand

Supply chain capacity increases

Suppliers upskilled and EHC quality marked

Availability of high quality suppliers improves

Installation costs decrease and quality improves

Increased demand for energy-efficiency measures, integrated into household repairs, maintenance and improvement

Consumer offer refined and communicated

Continued quality assurance generates feedback and improves consumer satisfaction

Trust, consumer confidence and awareness continues to grow

Increase in supply chain confidence and appetite

Futureproof scheme negotiates lower prices for materials

Assumes that financial returns are attractive to new suppliers.

Consumer convenience and benefits continue to be delivered

Consumer insight generated through monitoring of some customers

Need for new skills identified

New training packages developed

Assumes training effective

More consumers take-up offers from trusted, good quality suppliers via Futureproof scheme

Availability of high quality suppliers improves

Suppliers upskilled and EHC quality marked

More suppliers enroll in Futureproof scheme and participate in training

Assumes spare capacity in the market

Assumes that financial returns are attractive to new suppliers (mainly 'early adopter' suppliers so far)

Increased demand for energy efficiency measures as part household repairs, maintenance and improvement activity

Increase in supply chain confidence and appetite

Supply chain capacity increases

Consumer offer refined and communicated (e.g. via Green Open Homes; sustainability networks)

Assumes project can negotiate discounts with materials suppliers

Increase in consumer trust and confidence (80% willing to recommend to friends)

Assumes Bristol City Council willing/able to undertake inspections by Clerk of Works

Consumer convenience and benefits delivered (comfort + cost savings)

Supplier quality issues monitored and addressed (including Clerk of Works inspections)

Insights generated from some customers

Assumes EHC Quality Mark/PAS 2035 is ready

Retrofit activity occurs in tandem with household repairs, maintenance and improvement activity

Assumes training is effective in improving delivery quality (requires QA evidence)

Quality of delivery improves

Suppliers upskilled (and EHC/PAS 2035 quality marked?)

Some consumer monitoring undertaken (for those still in contact with Futureproof services)

Assumes Futureproof suppliers see need for and attend free training

Customers obtain and take up quotes (some from Futureproof installers)

Quality of customer interface improves; suppliers use Futureproof brand

'Early adopter' suppliers enroll in Futureproof scheme and participate in training

Assumes specialist suppliers and general builders are interested in deep retrofit work and willing to enroll in Futureproof scheme (external factors - GHG)

Customer needs assessed (including survey if needed) - signposted to installers

Input: insight from other pilots shared

Customers contact Futureproof advice line

Launch of a co-ordinated Futureproof campaign aimed at 'early adopter' suppliers (no household marketing campaign needed to generate enquiries)

Supply chain training packages developed (including toolbox talks; product specific support; customer service quality support)

Year 1

Assumes Futureproof reaches 'early adopter' suppliers via builders merchants and other routes

Development of a shared supplier/ consumer 'offer' and targeted approach to marketing and promotion

Assumes Code of Practice is acceptable to both suppliers and consumers (supported for larger companies)

Futureproof Code of Practice developed

Local authorities engage with the scheme (Bristol CC, B&NES)

Marketing testing of brand concepts with target group ('early adopters' via Green Open Homes)

Housing markets assessed and target building types / location identified

Assessment of supply chain skills needs

Assumes skills needs assessment is informed by installer network insights regarding the nature of the target market

Intervention: establishment of a local partnership for the delivery of energy-efficiency measures within household repairs, maintenance and improvement

Existing Green Register provides initial installer network

Assumes Green Register provides access to initial supply chain of sustainable building contractors

Inputs: BEIS Funding £186k in Year 1, £246 in Year 2, 3 tbc); CSE energy advice line, tools and resources; CSE analysis of housing stock data; Green Register - sustainable builders network; Greenhouse PR - expertise in communicating sustainability/carbon issues to consumers.

KEY

Text in red: not yet tested/proven

Rationale: The Clean Growth Strategy includes an aspiration for as many homes as possible to be EPC Band C by 2035. However, current levels of housing retrofit activity are low and mostly associated with Government subsidy scheme. The 'Building a Market for Energy Efficiency Call for Evidence' identified a number of barriers, both demand and supply side, to market growth and, to address the latter, suggested that Government consider funding third-party organisations as a means of improving co-ordination within, and ultimately growing, local supply chains dealing with the 'able to pay' (non-subsidised) domestic market. The Local Supply Chain Demonstrator Programme is intended to pilot this approach through different organisations, in different operational environment and through locally designed interventions. The Futureproof project in South West England aims to unlock latent demand for energy efficient retrofit by helping 'early adopter' consumers (who are already motivated and able to pay) to find trusted, good quality suppliers. This is expected to demonstrate demand to suppliers, causing more suppliers to enter the market for energy efficient retrofit, making it even easier for consumers to find a trusted, good quality supplier, and creating a virtuous circle of increasing demand and supply.

KEY

- Assumption proven/supported
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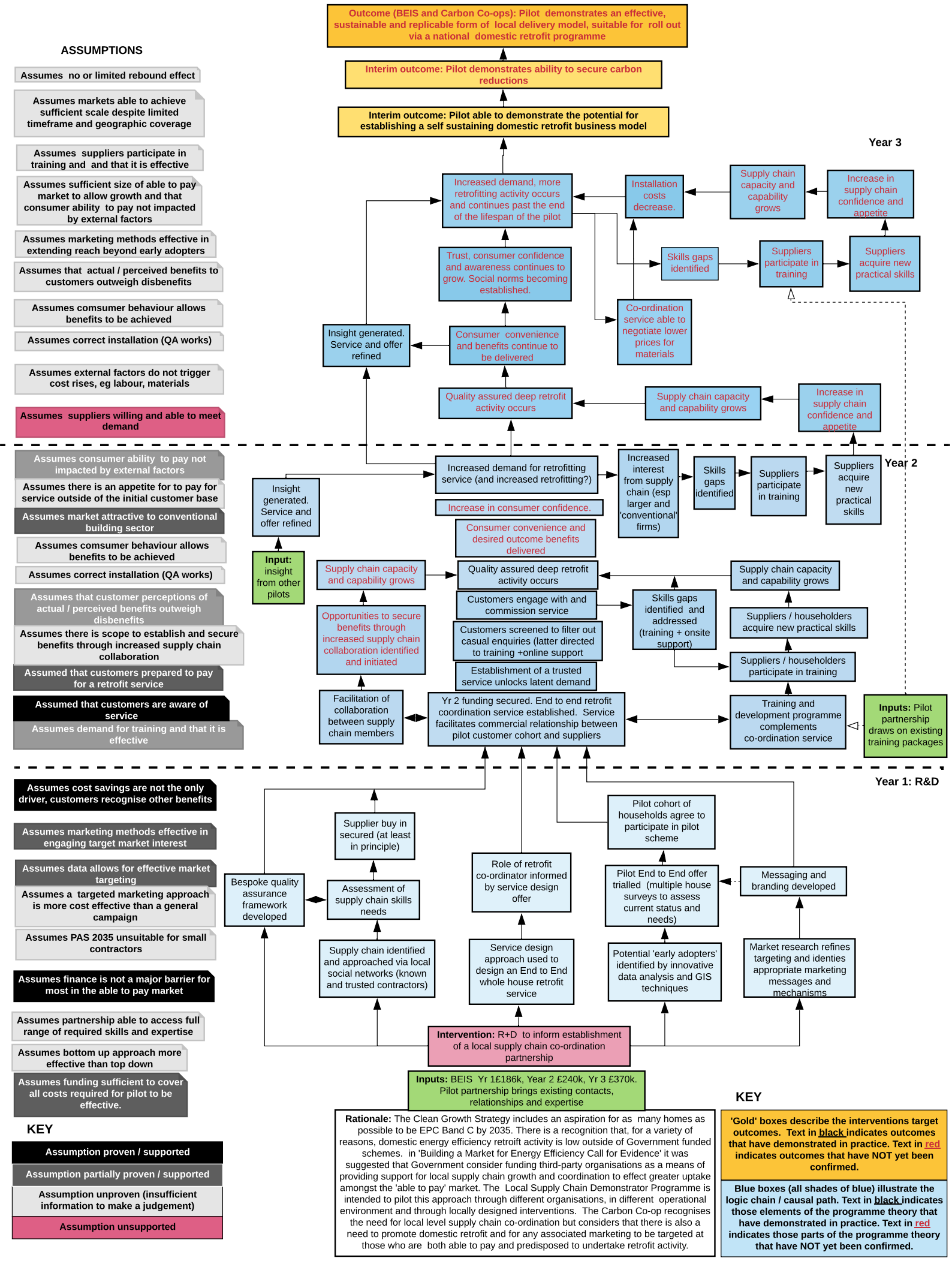
Theory of Change: People Powered Retrofit local supply chain pilot Phase 3 (V1.0) 14.4.2021



ASSUMPTIONS

- Assumes no or limited rebound effect
- Assumes markets able to achieve sufficient scale despite limited timeframe and geographic coverage
- Assumes suppliers participate in training and and that it is effective
- Assumes sufficient size of able to pay market to allow growth and that consumer ability to pay not impacted by external factors
- Assumes marketing methods effective in extending reach beyond early adopters
- Assumes that actual / perceived benefits to customers outweigh disbenefits
- Assumes comsumer behaviour allows benefits to be achieved
- Assumes correct installation (QA works)
- Assumes external factors do not trigger cost rises, eg labour, materials
- Assumes suppliers willing and able to meet demand
- Assumes consumer ability to pay not impacted by external factors
- Assumes there is an appetite for to pay for service outside of the initial customer base
- Assumes market attractive to conventional building sector
- Assumes comsumer behaviour allows benefits to be achieved
- Assumes correct installation (QA works)
- Assumes that customer perceptions of actual / perceived benefits outweigh disbenefits
- Assumes there is scope to establish and secure benefits through increased supply chain collaboration
- Assumed that customers prepared to pay for a retrofit service
- Assumed that customers are aware of service
- Assumes demand for training and that it is effective
- Assumes cost savings are not the only driver, customers recognise other benefits
- Assumes marketing methods effective in engaging target market interest
- Assumes data allows for effective market targeting
- Assumes a targeted marketing approach is more cost effective than a general campaign
- Assumes PAS 2035 unsuitable for small contractors
- Assumes finance is not a major barrier for most in the able to pay market
- Assumes partnership able to access full range of required skills and expertise
- Assumes bottom up approach more effective than top down
- Assumes funding sufficient to cover all costs required for pilot to be effective.

KEY

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- Assumption partially proven / supported
- Assumption unproven (insufficient information to make a judgement)
- Assumption unsupported

Rationale: The Clean Growth Strategy includes an aspiration for as many homes as possible to be EPC Band C by 2035. There is a recognition that, for a variety of reasons, domestic energy efficiency retroift activity is low outside of Government funded schemes. in 'Building a Market for Energy Efficiency Call for Evidence' it was suggested that Government consider funding third-party organisations as a means of providing support for local supply chain growth and coordination to effect greater uptake amongst the 'able to pay' market. The Local Supply Chain Demonstrator Programme is intended to pilot this approach through different organisations, in different operational environment and through locally designed interventions. The Carbon Co-op recognises the need for local level supply chain co-ordination but considers that there is also a need to promote domestic retrofit and for any associated marketing to be targeted at those who are both able to pay and predisposed to undertake retrofit activity.

KEY

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