

AFFIRMATIVE INTEGRATED ENERGY DESIGN ACTION

AIDA

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D2.2 Report on Study Tours

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Note concerning the D2.2 Interim Report and Final Report

The D2.2 Interim Report's primary goal was to help AIDA partners improve study tour organisation and visits through capitalising on lessons learnt. As such, a large part was given over to feedback and evaluation.

The D2.2 Final Report's primary goal is to report on the Study Tours, and as such differs considerably from the Interim Report, and catalogues the study tours and workshop, and provides insight into project partners impressions and general feedback on the organisation of study tours.

1. Introduction and objectives

Responsible for more than 40% of the total energy consumption, the building sector is one of the main energy consumers and greenhouse gases emitter in Europe. To address this problem, the European Union has adopted an ambitious strategy to considerably improve the energy performance of buildings in the 28 member-States.

In accordance with the objectives established in 2010 through the Directive on building energy performance, all new building that will be constructed in Europe from 2020 onward should be "nearly Zero Energy", meaning that their energy needs for heating and cooling, hot water and ventilation should be reduced so that it becomes possible to produce on-site a large majority of the remaining needs thanks to renewable energy sources.

This challenge requires all stakeholders to be convinced that such a target is not only desirable, but is also actually reachable: what better proof than the nearly Zero Energy buildings (nZEB) that have already been built in different European countries?

"Seeing is believing", and one of the best ways to convince anybody that something exists and works properly is to show them a concrete example, and the opportunity for someone who is in a building planning process to meet the owner of a nZEB and to directly learn from experience is certainly great way to get people engaged in the process.

The objectives of these actions can be summarised as follows:

- to increase the visibility of the nZEB front-runners
- to encourage decision-makers and building owners to opt for nZEB
- to develop knowledge and foster confidence among the public and private building owners and builders toward nZEB.

Activities of the Study Tour task were:

- to identify the most relevant projects (front-runners) to visit
- to organise study tours of these projects for the two target groups (i.e. local authorities and architects & masters builders)

A double objective of preparing municipalities to act in order to follow through with NZEB proactive policies and enable participants to gain experience form front-runners and improve their understanding and knowledge guided study tour organisation.



The advantages of this approach are:

- to mix decisions makers and construction professionals and so foster exchanges and transversal and inter-disciplinary approaches
- to offer participants peer "testimony" and gain from their experience (e.g. decision makers will learn from the experiences of pioneer decisions makers and architects will gain experience thanks to the lessons learnt from architects involved in pioneers projects)
- to disseminate the experiences and lessons learnt from pioneers projects (e.g. CONCERTO) and to increase front-runners visibility.

Following this study tours consisted of building (or site) visits, and workshops for participants. Building and site visits were conducted either singly (one building only) or grouped (several buildings, sites or infrastructures). Workshop formats were extremely varied, from short presentations by building stakeholders during a building visit, to larger events separated from the building visits with special goals (attracting participants generally not available during working hours, coinciding with partner events etc).

The variety of buildings and sites visited and the content of the workshops throughout the AIDA programme has demonstrated the diversity of applications and technical or methodological means available to stakeholders to reach nZEB targets. The defects or missed targets of certain buildings visited has also been educational, and has contributed to participants the knowledge on how best to meet nZEB targets.

Targets for study tours in Austria were met, with 13 study tours and 546 participants Targets for study tours in France were nearly met, with 12 study tours and 396 participants. Targets for study tours in Greece were met, with 9 study tours and 457 participants. Targets for study tours in Hungary were nearly met, with 12 study tours for 343 participants Targets for study tours in Italy were met, with 13 study tours and 427 participants Targets for study tours in Spain were met, with 17 study tours / workshops and 867 participants¹. Targets for study tours in the United Kingdom were not met, with 8 study tours for 154 participants

Overall, 75 study tours were organised across 7 countries. More than 80 different sites or buildings were visited, and synergies with many parallel events were used for either building visits or workshops.

2. Partner feedback on Study Tours

AIDA project partners have organised over 75 study tours, with each partner having organised approximately a dozen each. The feedback and lessons learnt from the sum of these experiences can be summarised as follows:

- AIDA individual study tour goals were ambitious : a more realistic goal would have been to plan either more study tours to reach the participant goal, or less participants. In practice, most partners have done more study tours than the planned 9 to reach, or approach, the participation figures.

¹ Number may differ slightly with Work package 6 : Improvement and Evaluation of the Action evaluations, due to including organisers in the number of participants.



- Linking study tours to other relevant events increases visibility and draws participants from a coherent pool of interested parties. Conferences and expositions are good tie-in events.
- Co-organising with other organisations improves visibility and gives direct access to different target groups. Building and architect associations, scientific committees, local authorities all allow direct access to their members.
- Study tours designed for a single client (for example, a local authority) can be laborious to organise, as the decision process and publicity may no longer be in the organiser's control.
- Effective evaluation and feedback from participants requires planning a specific time for completing and collecting evaluation forms during study tours.
- Professional practices differ across partner countries, and whilst it is necessary to remunerate architects or building professionals hosting or presenting during a study tour in some regions of Italy, Spain or the United Kingdom, it is infrequent in France, Greece, Hungary and Austria.
- For most key target groups, the best communication channel was direct email solicitations (email "word of mouth" and personal invitations), either by AIDA partners or co-organisers or partner event organisers.
- No clear consensus on the decision to impose a fee for participants was reached. The length and type of buildings visited, the country and the partner events are all factors to be considered before deciding to impose a fee.

Specific feedback and reflections form each partner also chart the experiences in different countries.

The Austrian experience:

AEE INTEC found that "the study tours are more successful if we can link them to a second event. This could be a workshop/seminar/technical tour of another research project or a national/international conference." They appreciated the sharing of the workload between organisations and the capacity to directly promote the study tour to the contacts of each organising partner, and the ability to promote the study tour to a pre-disposed target group (those attending the linked event).

When planning study tours, dates should be carefully chosen, as weekends, school holidays and public holidays all impact the number of potential participants.

AEE INTEC organised a visit with the specific goal of meeting the needs of a small municipality. The experience was not conclusive, as the municipality requested a change in the date several times, leading to a very small time frame for publishing the event before it was held, and resulting in fewer participants than was desired. It is not an experience that AEE INTEC wishes to repeat.

TU WIENs experience concords with that of AEE INTEC: linking a study tour to an existing event creates synergies and improves the participation rate. They met some difficulties with getting evaluation forms completed when they was no structured time allocated at the end of a study tour (specifically, when study tours finished on-site and people could leave as they wished.)

The French experience

Hespul's experiences are similar to other partners; organising a visit tailored to a municipalities needs is delicate as the choice of the date and the promotional materiel is not under Hespul's control, and can result in smaller attendance numbers than desirable. Partnerships with different organisations for the promotion of the study tours has proven beneficial in terms of getting participation from all the different target groups (elected officials, technicians, building professionals and architects).



Hespul's most successful visits, in terms of participation and the quality of the exchanges and networking by participants during the study tour, were those co-organised with partner organisations. The dynamics and access to targeted groups contributed to the success of these visits, and sharing the workload was also appreciable as it "stretched" the budget further.

Hespul appreciated the study tours that were overnight or involved bus transport as "they created a confined space where the study tour participants exchanged and discussed more freely than in another environment." A study tour was cancelled due to a lack of inscriptions, partly due to the difficulties related to co-organising with a municipality.

One of Hespul's concerns was to include very cutting edge subjects in terms of building performance, hence the focus on grey energy and building consumption for the longer study tours (St Cirgues, Vosges, Vorarlberg).

The Hungarian experience

The pool of front runner buildings and building professionals interested in nZEB buildings is quite small in Hungary, and despite the good overall attendance numbers, many participants attended more than one study tour, so the overall umber of people influenced is lower than could be expected.

Geonardo remarked "We covered most of the flagship buildings in this realm in Budapest and in the countryside alike. We also had a number of participants who were genuinely interested in these buildings and they were considering to build along these principles in the future."

The Italian experience:

EURAC experience shows a significant increase of the positive results obtained by the studies tours, in the last year of the project. EURAC has organized more visit tours than the planned ones, achieved the number of participants scheduled.

EURAC has organized some visit tours in collaboration with TIS (Technology Innovation Park), because they usually organize tours to visit buildings with high aesthetic characteristics and have a lot of contacts with chambers and association of architects, engineers, public representatives and other provinces. In other cases, EURAC has shared this experiences involving Universities, private companies, and Chamber of Architects and Engineers, and organizing the events in a big city, such as Milan, where the turnout is greater than in Bozen.

To guarantee a high number of participants and to stimulate and increase the participation, EURAC has decided to organize more tours than originally planned, presenting different buildings (schools, private houses, gym, offices, museum, etc.) for a total of eleven (11) nZEB case studies. From the prevision of Annex I of AIDA project, the Italian tours have had two difference, an obligatory fee and a reduced number of participants, because participants usually came from other Italian regions by train, so it was necessity to rent a bus to organize the tour and move them from the city center to the case-study. Furthermore, in Italy it was necessary to remunerate architects or building professionals hosting or presenting during a study.

The Spanish experience

IREC's experience of the study tours and workshops "was very good", and the last study tours attracted record participations. They found that participants were "demanding about information of real performance of the building. Also, detailed design solutions, construction and design cost, simulation results against real demand" and IREC highlights the need for well constructed success story cards, or the participation of someone with the information available during the study tours.



The UK experience

A number of different formats of tour were tried including offering lunch, providing a bus to more remote buildings, and shorter tours for those who were unable to take much time out from their normal working day. None of these options significantly affected the numbers of participants, in fact when a bus was offered nobody used it, everyone preferring to use their own cars. The most successful tours were those organised in conjunction with similar events or partner organisations.

3. Evaluation of AIDA partner feedback months 1 – 18

Partner feedback was evaluated so as to provide recommendations to improve and facilitate study tours organised in months 18 - 36.

The text from the D2.2 Interim Report is reproduced below, for information.

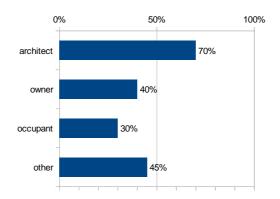
A series of semi-closed questions were send to AIDA partners to gather feedback on the success of the visits and their organisation. These questions, and a summary of replies, are discussed below.

- Q : Building Name & location
- Q : Is this the building described in the guide on success stories, D2.1? yes/no
 - 9 of the buildings visited do not yet have an AIDA Success Story Card
- Q: Was the building under construction? yes/no occupied? yes/no
 - With one exception, all buildings visited were occupied

Q : Which building stakeholders accompanied the visit? architect / owner / constructor / occupant / other

• Most buildings visited during the study tours were visited with the accompaniment of the architect.

Prevalency of stakeholders on study tours

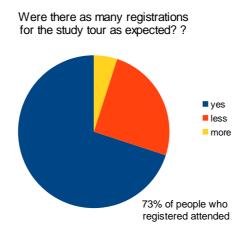


- Q : Did you get as many registrations as expected? yes/no
- Q : If less, what do you think was the reason? (date, programme, costs etc.)
- Q : Did all the people registered for the study tour and work shop attend? yes/no
- Q : Approximate % ?

Q : If less than 80% attended, what do you think was the reason? (weather, delay between registration and actual visit, no constraint (eg payment) to make registration "serious", etc)



- For 1/3 of the study tours, registration numbers were lower than expected. One study tour was cancelled due to lack of participants, and one study tour was overbooked and participants were split into 2 groups. The principal reason suggested for low registration numbers was a poor choice of date, to close to, or during holiday periods or in periods of high activity for target groups.
- For the majority of study tours, more than 80% of people registered turned up on the day. However, for 3 study tours bad weather (storms, snow) is suggested to adversely affect attendance. A lack of fees to make registration a "serious" commitment is also suggested as a reason for lack of attendance for 2 study tours. Overall, 73% of people registered attended.



• There is no evidence that the buildings function influenced the number of registrations or visitors. Lower than expected registrations happened in all building types,

Q : Did you get the type of professionals you expected (ie architects, students etc) yes/no

- Q : If not, what do you think was the reason? (date, programme, communications etc)
 - In nearly all cases (16 out of 18), the participant's occupations were as expected. The Austrian partners regretted a lack of participation from local authorities and elected officials.
- Q : Do you think the building visit was an essential part of the study tour? yes/no
- Q : Do you think the workshop was an essential part of the study tour? yes/no
 - There does not seem to be a clear consensus on the necessity of including workshops in the study tours (5 "no" replies), whilst a building visit was deemed essential in all cases where it was planned in the study tour. However, a few study tours had workshops held after study tours, which may have impacted on their attractivness.

AIDA partners were also asked 3 questions to identify the most successful study tours:

Q : Which study tour / workshop felt the most successful to you ?

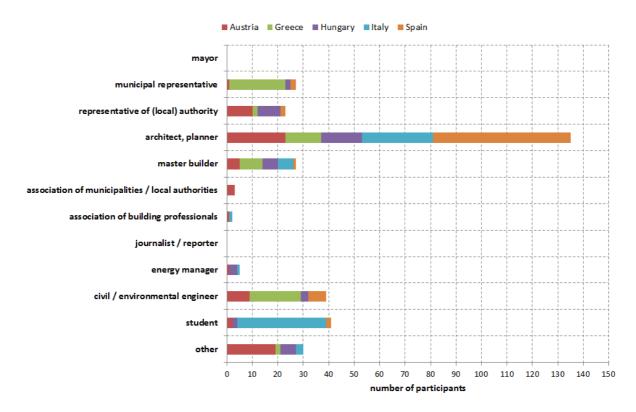
Q : Why do you think this ? (people asked more questions, took more photos, followed up more often)

Q : What do you think made it the most successful (the building chosen, the organisation, the guides / speakers, the group of participants, the weather, others) ?

• Few replies were received, but the general feeling is that the opportunity to discuss technical choices with the architect and designers is a strong point.



Based on data collected through the Evaluation Sheets used for D6.1, it appears that there were more architects and planners (over 130) than any other profession present. Building professions - master builders and civil / environmental engineers - were present in a lesser number (a total of approximately 60), students attended in significant numbers (over 40). Elected officials and municipals representatives were present (a total of approximately 50). Mixing of local authority representatives and building professionals / architects is one of the goals of this work package; an increase in the number of elected officials would be desirable.



The main interest points of participants, as indicated in the comments section of the D6.1 evaluation sheets are technical points, depending on the building visited. This includes technical subjects such as: summer cooling methods, use of heat pumps, renewable energies, insulation and daylight... Non technical interest points include interactions during the planning process and building management.

4. Actions after Interim Report Recommendations

After the analysis of the study tour organisation, several key recommendations were made to assist AIDA partners in achieving the project goals (9 study tours / 429 participant per country)

These recommendations were as follows :

Study Tours Report

- **1.** Study tours should either be organised more often than presently or accept more attendees to increase the number of overall attendees during the AIDA programme life.
- 2. New promotion and communication vectors should be sought to increase the number of elected people and press representatives participating.
- **3.** Particular care should be taken when choosing tour dates to ensure that proximity to holidays and predictable bad weather will not discourage attendance



- **4.** Stakeholders such as Architects should continue to accompany the study tours to provide technical information to participants
- **5.** Technical data sheets specific to the buildings visited in the study tours (for example, the AIDA success Story Card for the building) should be provided to inform participants on energy use and technical building choices.

Partners have acted on these recommendations, increasing the number of planned study tours to compensate lower per tour attendance numbers, carefully selecting dates, providing technical sheets (such as the Success Story Cards or locally available technical sheets). Partnering the study tours to relevant events with similarly motived organisations was also adopted.

5. Conclusions

The following recommendations have been developed based on feedback from project partners reported in the Interim Report, and feedback gathered towards the end of the AIDA project.

Key elements for the success of a study tour are :

- A tour program and calendar that builds on synergies with local events and partner organisations
- A comprehensive promotional plan to the target audience well in advance of the tour
- A well-documented, technically competent, building guide for example, the project architect or engineering consultant
- Relevant workshop subjects
- Take-home documentation
- Smooth travel and catering planning

Lessons learnt indicate that

- Co-organization with local authorities requires a clear mandate from elected officials and a binding timetable
- · When international participants are expected, translation becomes necessary
- Bad weather may adversely affect participation rates
- Synergies with local events and professional associations are important

The adoption of these recommendations, built on the lessons learnt at the mid point of the AIDA project, improved the performance of project partners with regards to the ADIA project goals.

The number and variety of sites indicates that nZEB buildings, or buildings that have frontrunner characteristics, are present in every country, and the number of participants is witness to the interest the different target groups have for high performance buildings.

Partner feedback is clear in that linking study tours to similar events, or co-organising with relevant organisations is an important method of ensuring good participation numbers.

The result of the study tours should be in an increase in the number of nZEB buildings planned or built where a study tour participant is involved in the building process. The AIDA project does not have a project duration long enough to measure this impact, however positive comments and participation numbers show overall, the building sector and municipalities are willing to start learning.

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Upcoming changes in national laws relating to the application of the European 2010 Energy Performance of Buildings Directive requires all new municipal buildings to be nZEB from 1 January 2019. Project results indicate that whilst the competence for innovative design processes such as IED may not have been acquired at this stage by municipalities and the building professionals working with them (see results of D3.2, Public building tenders for several case studies with nZEB target), there is a clear interest to know more as demonstrated by the study tours attendance rates..

Unofficial results of the AIDA project include, for project partners, a widening of their networks and the future capacity to steer people to nZEB contact points who may continue to organise study tours as they take on nZEB promotion / contact point activites (see Work package 5 : Securing sustainability results).

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6. Study tours by country

In the second half of the programme, the Study Tours have continued, building on the experience of the first half of the AIDA project duration, below we have detailed Study Tours by country, with a glimpse at the programme and some event photos.

Austria

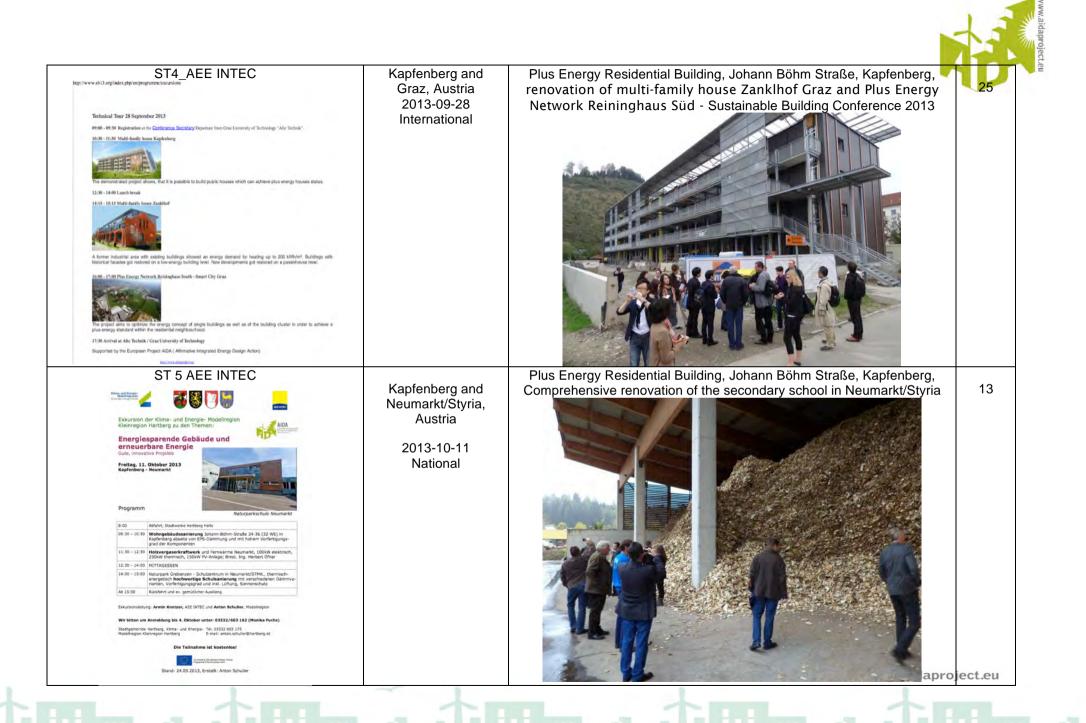
In Austria, AIDA partners organised 13 study tours, with a varied programme of buildings and infrastructure in the visits. These included multi-family dwellings, high-rise office buildings, schools and urban heating infrastructure. For example, the Plus Energy Residential Building on Johann Böhm Straße in Kapfenberg was visited several times, and a Success Story Card of the building was written. Study tours were organised in conjunction with local events such as the 2014 klima:aktiv trade faire and the 2013 Sustainable Building Conference, creating interesting synergies and ensuring excellent attendance rates. Overall targets for study tours in Austria were met, with 13 study tours and 596 participants.

| Partner | Location, date, type | Building, Title, Comments | People |
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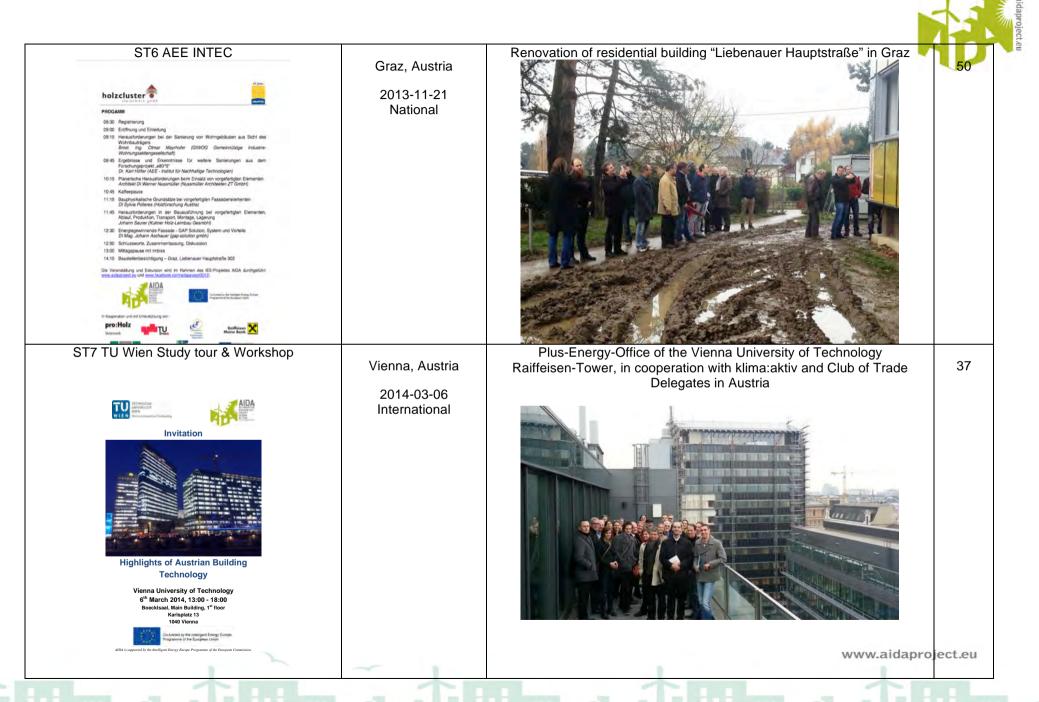
Table 1 Study Tours in Austria

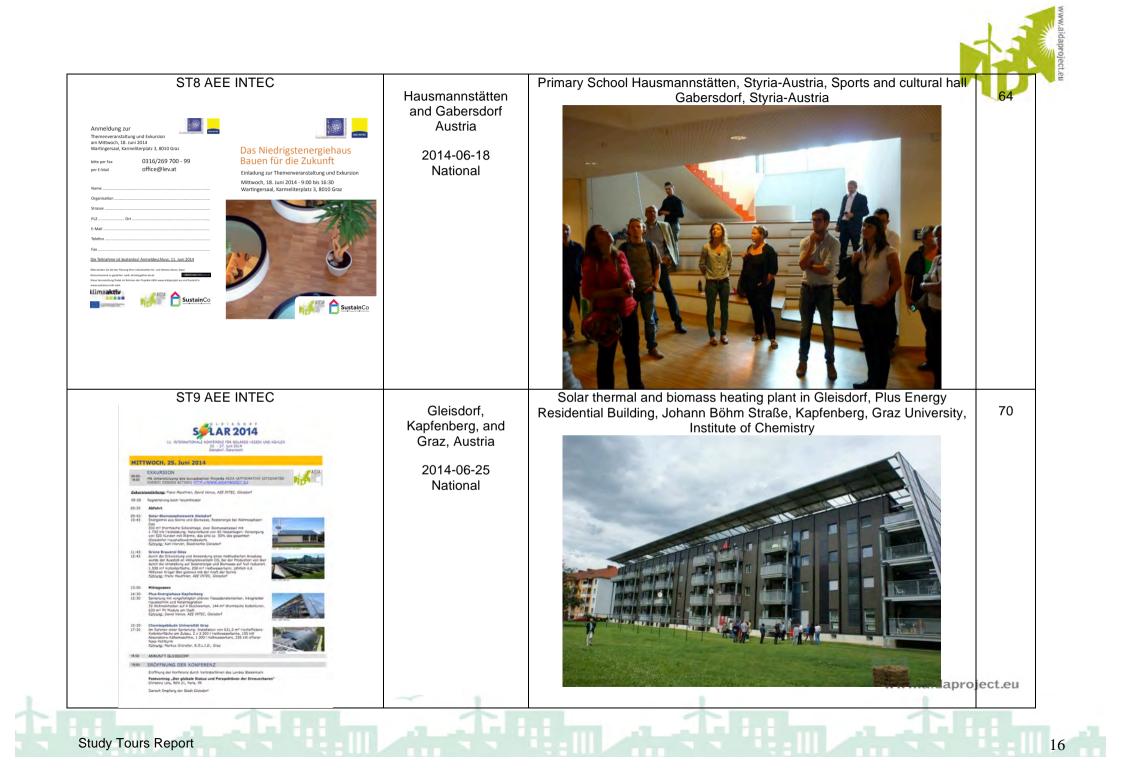


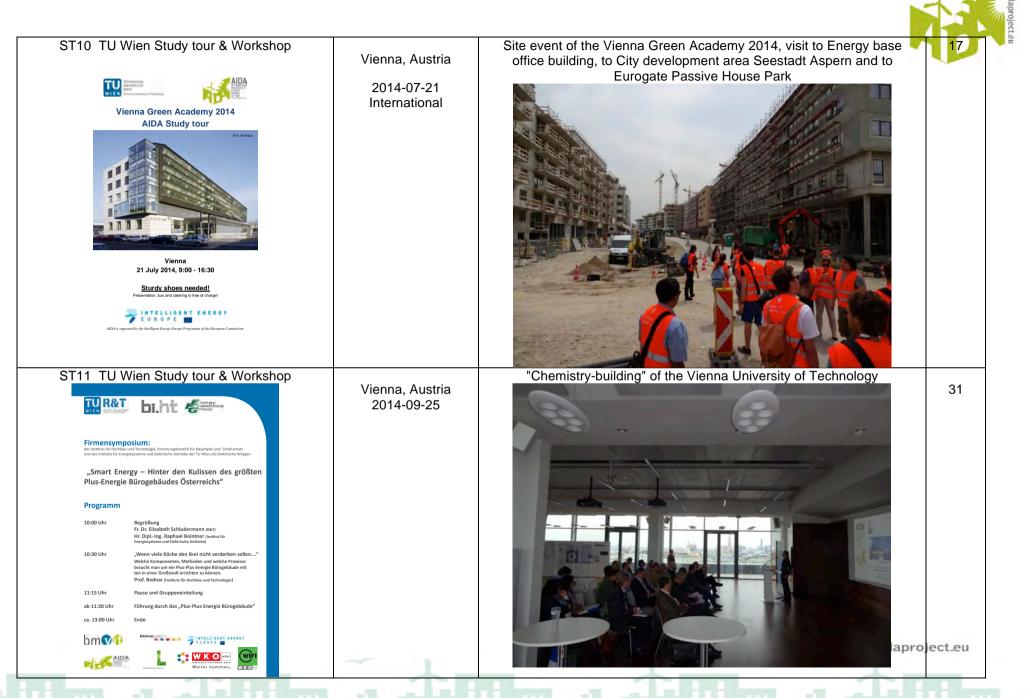
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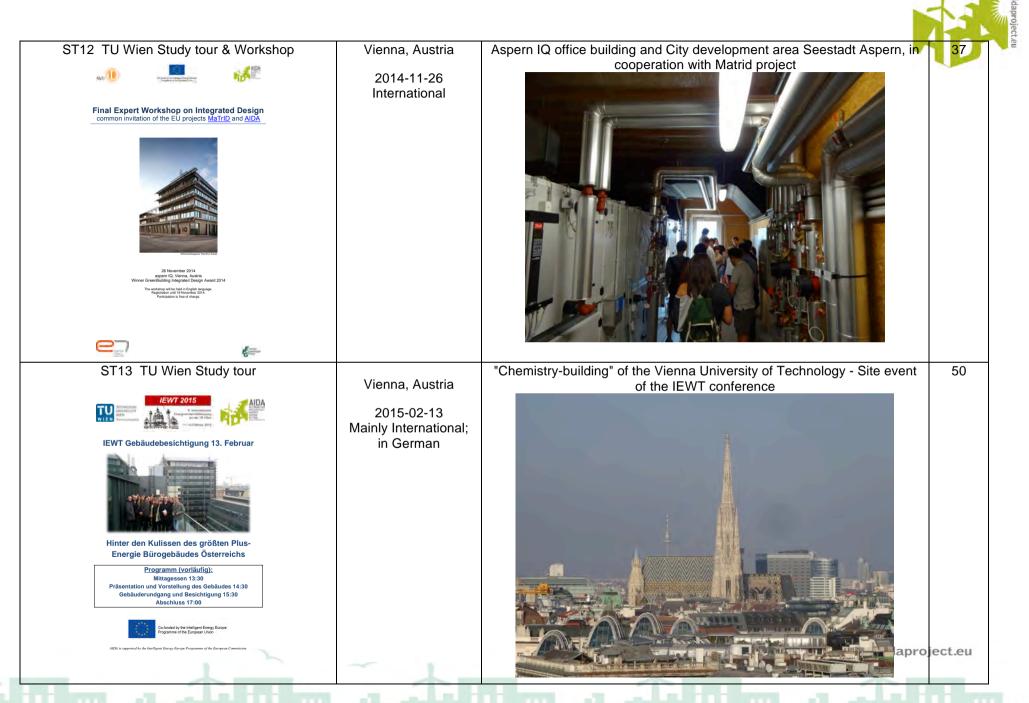


Study Tours Report











France

In France, AIDA partners organised 11 study tours, including 2 overnight bus tours. nZEB buildings were visited and for several tours a special emphasis was also on reducing grey energy through specific construction materials such as straw. Study tours were organised in conjunction with local partners such as VAD (Ville et Aménagement Durable), Oïkos or social housing companies and local councils. These partnership increased the type and pertinence of the targeted audience and created interesting exchanges during the study tours. Overall targets for study tours in France were nearly met, with 11 study tours and 396 participants.

The study tours began and finished with visits to the WOOPA buildings; the first study tours were accompanied by the building consultants, with a detailed knowledge of the project and the buildings, including the technical equipment. In the last visit, due to great demand for buildings visits, an outside company had been contracted to accompany visitors. Unfortunately, the outside person had little knowledge and referred participants to the technical documentation – it is unlikely that Hespul will propose to visit these buildings again in these conditions.

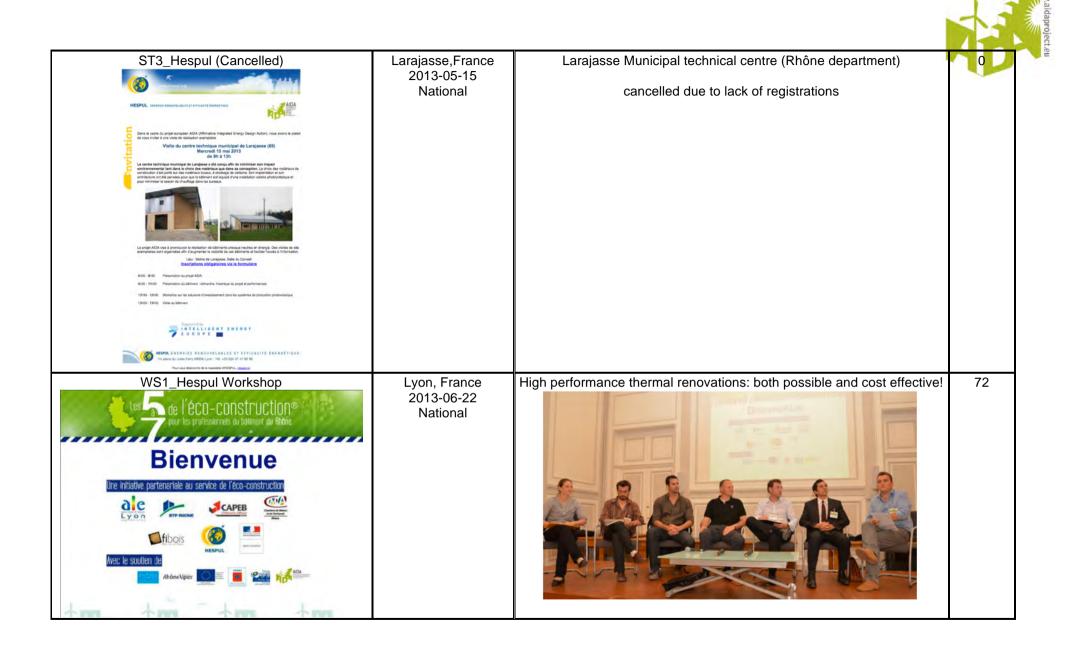
The second last study tour to the Vorarlberg was a significant success. Whilst is used a significant portion of the study tours budget, the quality of the buildings visited, the diversity of the participants and the added value that each participant brought to the visit was exceptional (elected officials, technicians, architects and specialised building consultants). The participants were also very active in their evaluation of the study tour, with many commentaries and a critical approach to the added value of the different presenters.



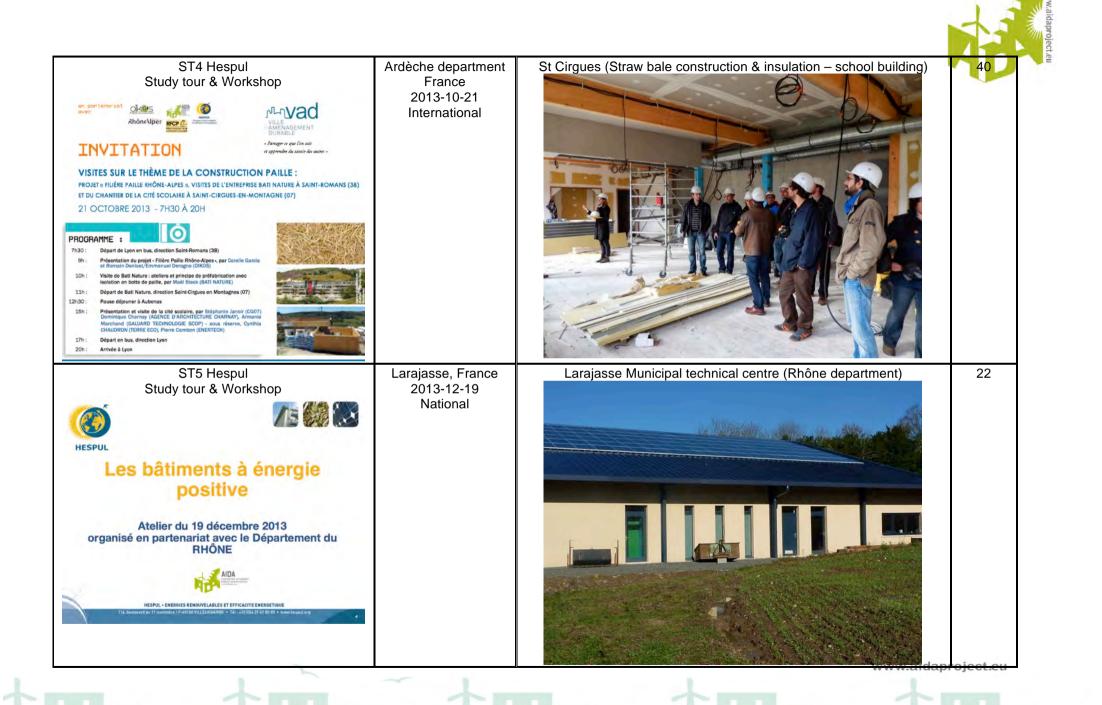
Table 2 Study tours in France

| Partner | Location, date, type | Building, Title, Comments | People |
|--|--|--|--------|
| ST1_Hespul Study tour No programme, building tour with a small group and close interactions with building stakeholders | Lyon, France 2013-03-18 National | <text></text> | 16 |
| ST2_Hespul Study tour No programme, building tour with a small group and close interactions with building stakeholders | Lyon, France 2013-04-18 National | WOOPA office building (Lyon, Rhône department) (no photo available) | 10 |

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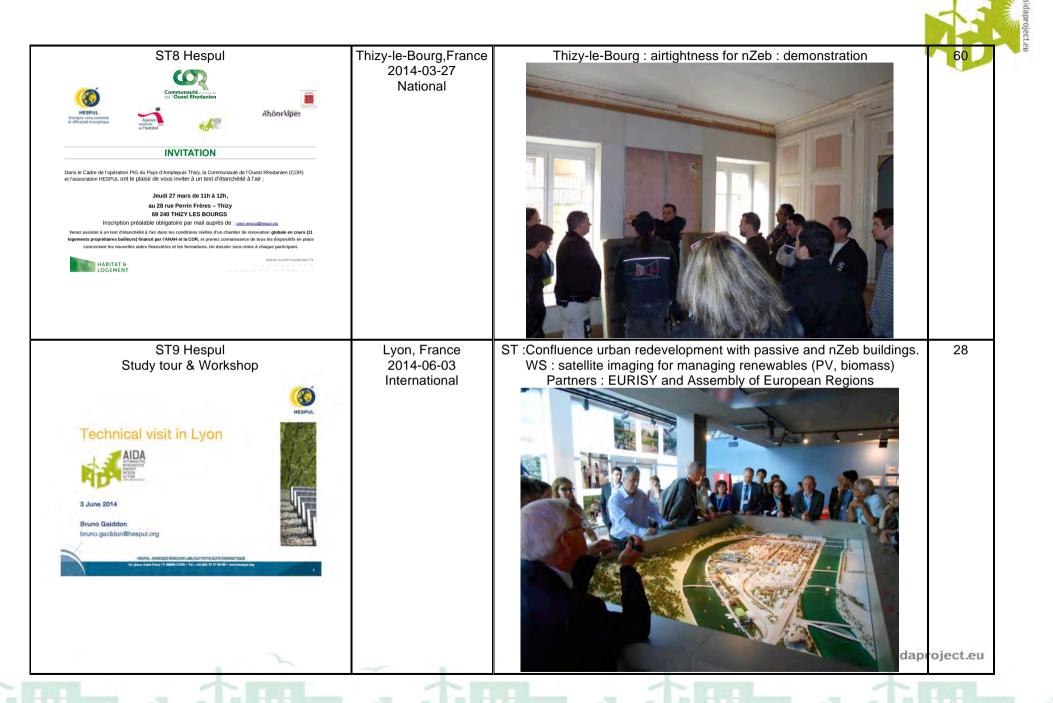


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Study Tours Report







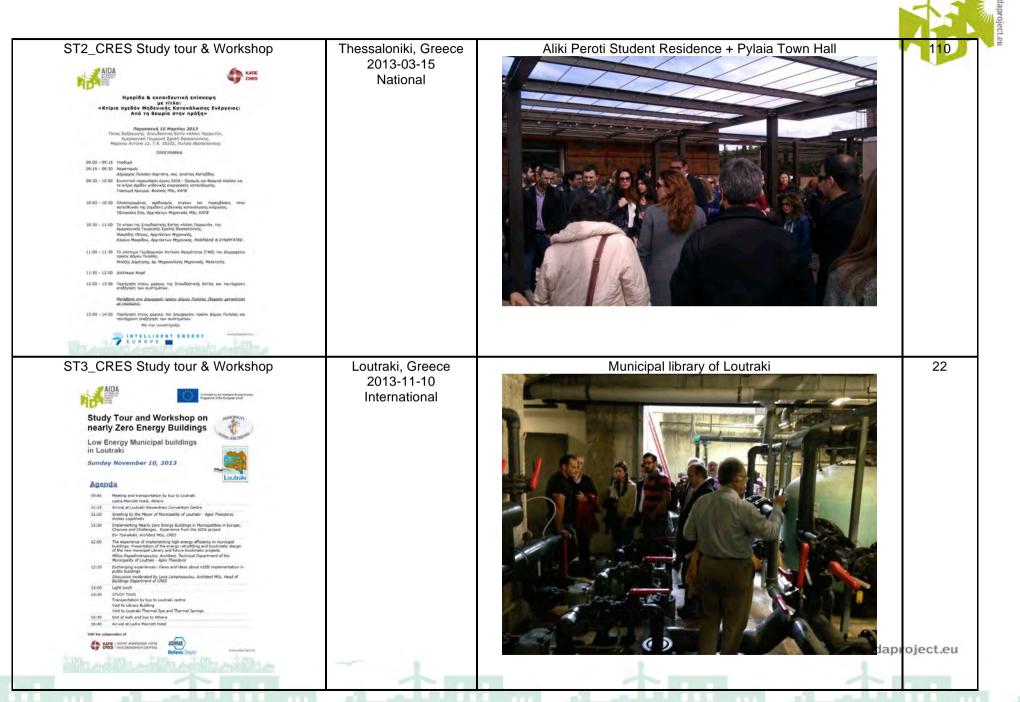
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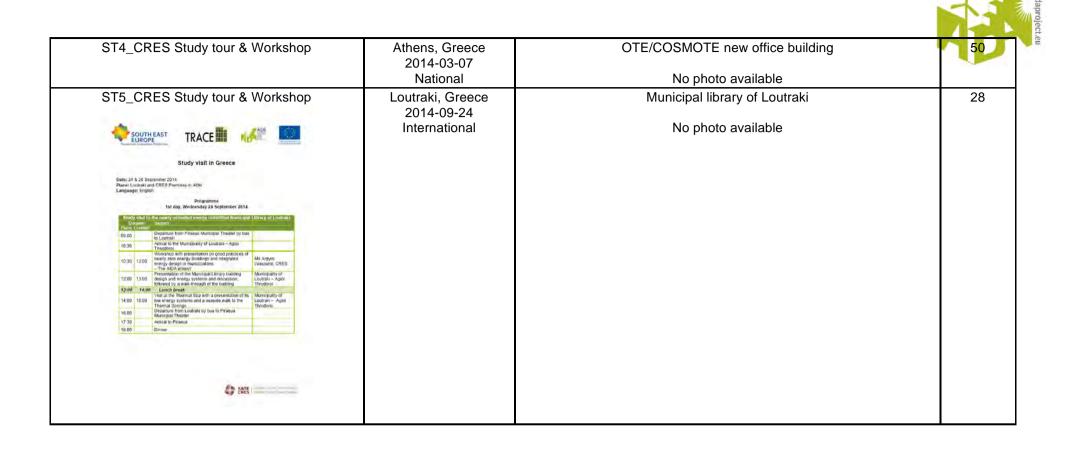
Greece

In Greece, AIDA partners organised 9 study tours. Study tours had very good attendance, with over 100 people at the 2^{nd} study tour. Study tours in conjunction with relevant programmes were also organised, such as the SEED programme, or with local authorities. These partnership increased the type and pertinence of the targeted audience and creating interesting exchanges during the study tours. Overall targets for study tours in Greece were met, with 9 study tours and 457 participants.

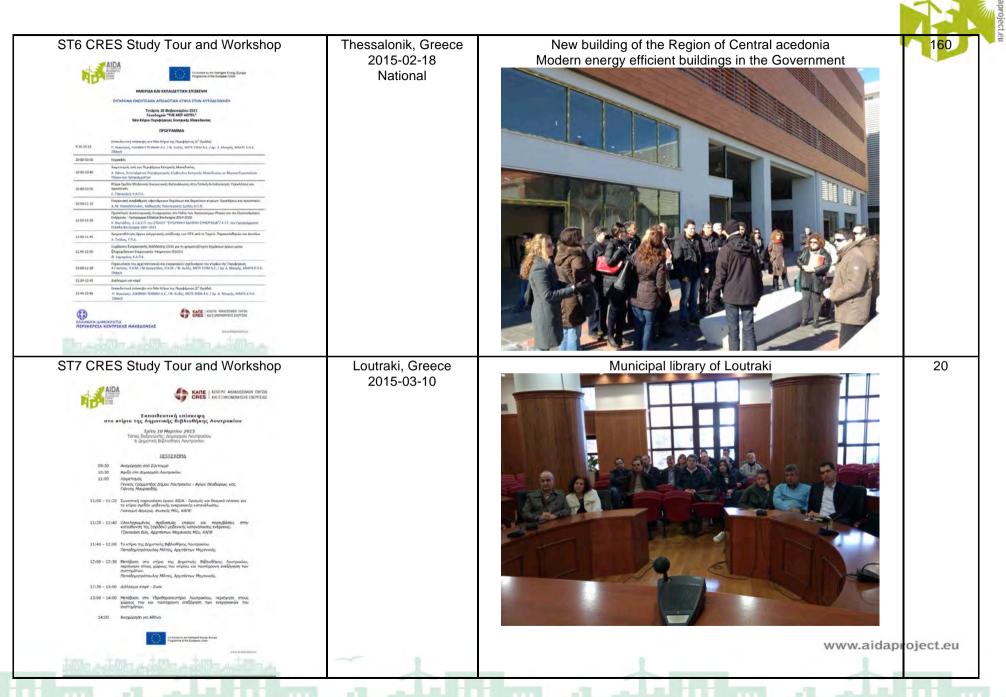
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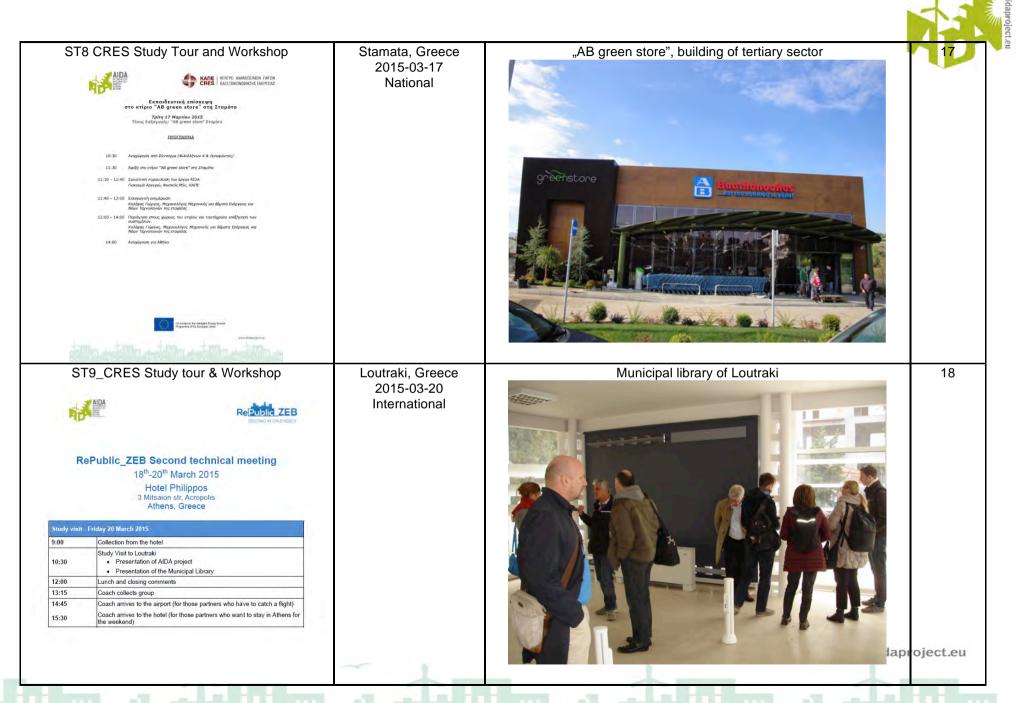
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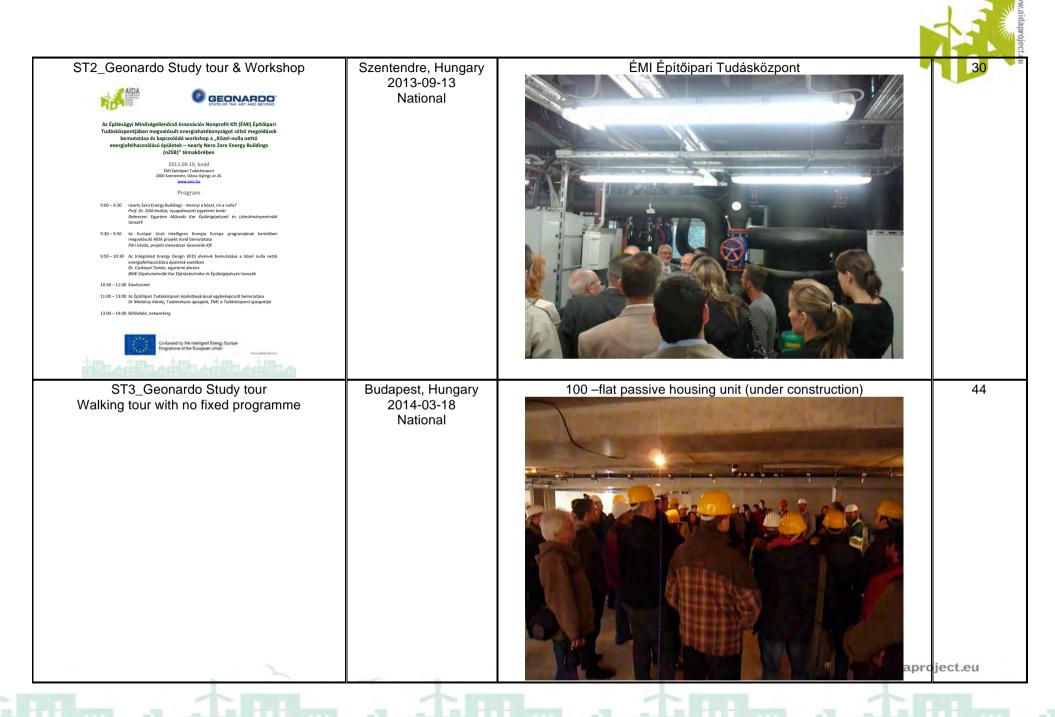
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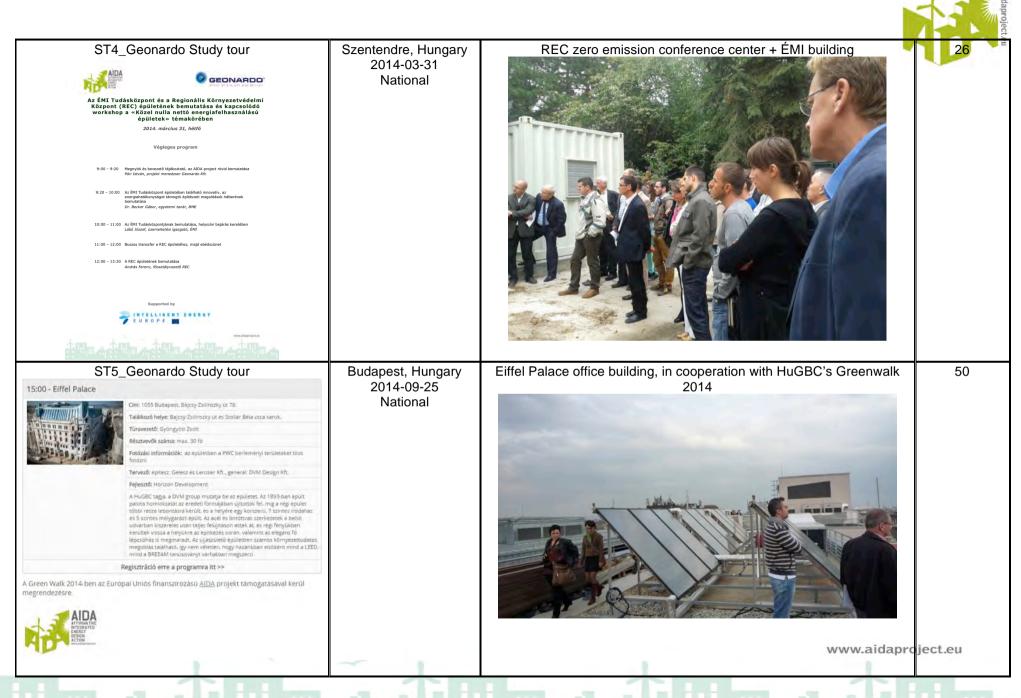
Hungary

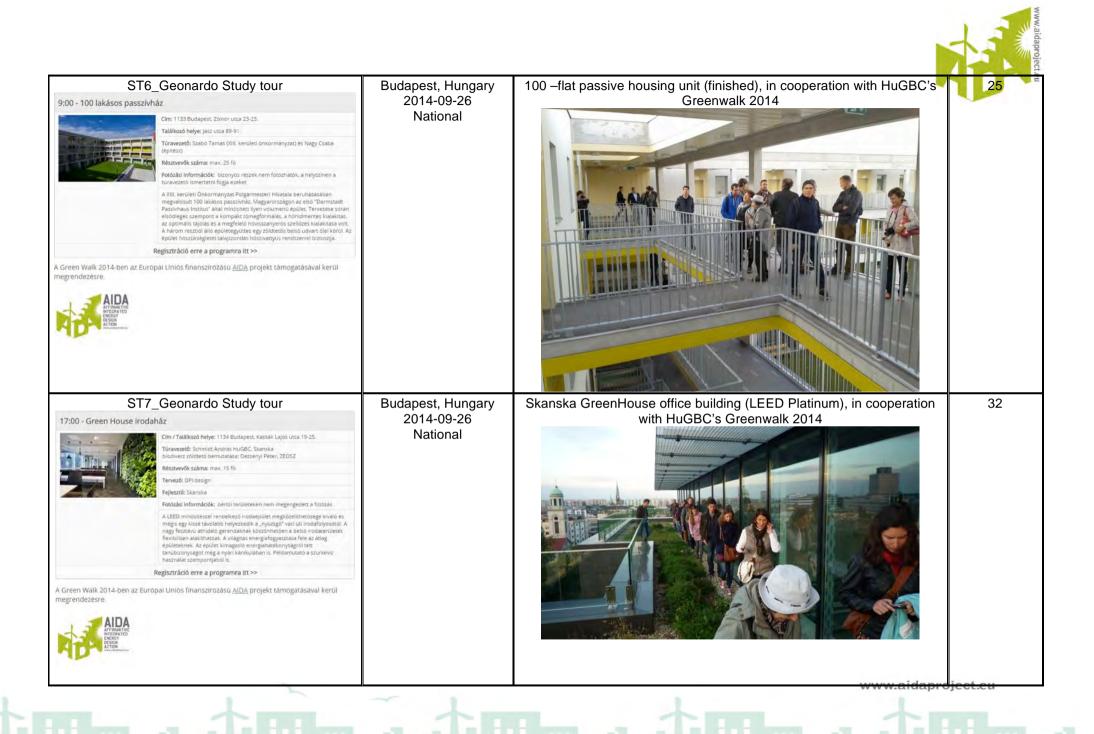
In Hungary, AIDA partners organised 11 study tours, including 4 in cooperation with HuGBC's Greenwalk 2014 and 2 in cooperation with MAPASZ within the International Passive House Days. These partnerships proved important to meet targets and streamlined study tour organisation. Overall targets for study tours in Hungary were nearly met, with 12 study tours for 347 participants, falling short of the targeted 429 participants. Geonardo remarked that is was particularly difficult to get people not already attracted to nZEB involved, and that the available building pool was relatively small.

| Partner | Location, date, type | Building, Title, Comments | Peop |
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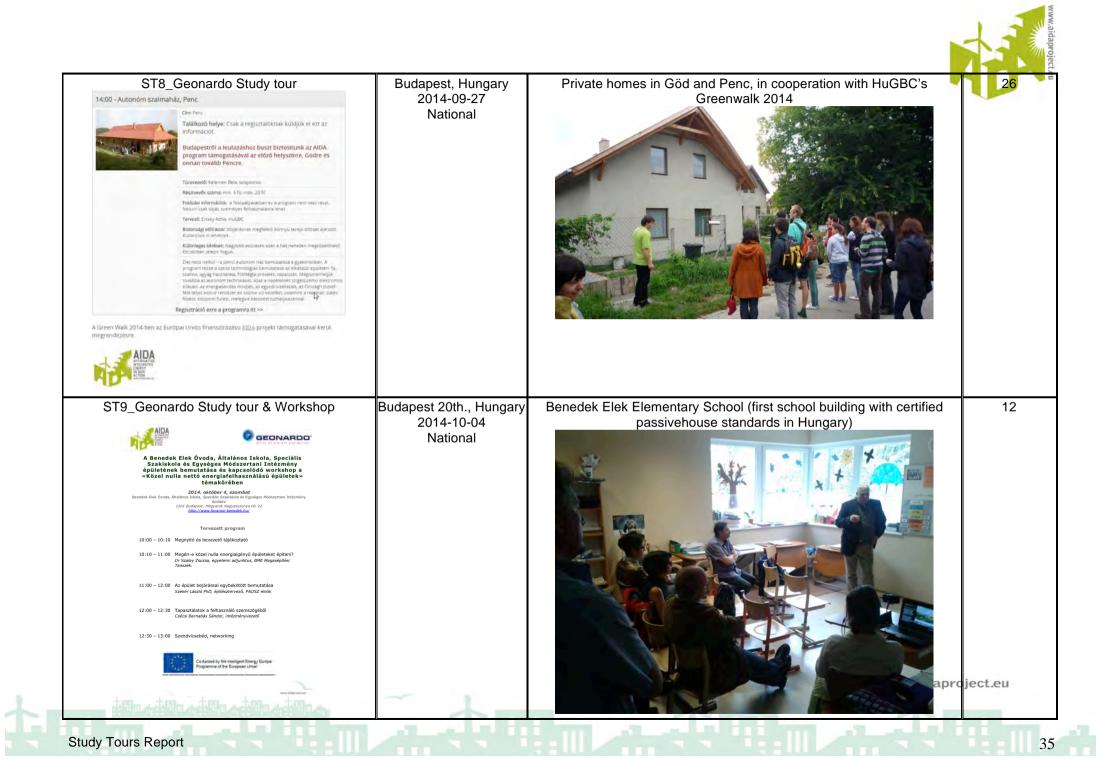
Table 3 Study tours in Hungary







Study Tours Report







Italy

In Italy, AIDA partners organised 13 study tours. Study tours were organised in conjunction with local events and partners such as enertour (specialised in this sort of study tour) and klimahause. These partnerships allowed for a greater professionalism in the organisation, and increased audience for the promotion of study tours. Overall targets for study tours in Italy were met, with 13 study tours and 427 participants. Low attendance numbers in some study tours was compensated by the organisation of extra tours.

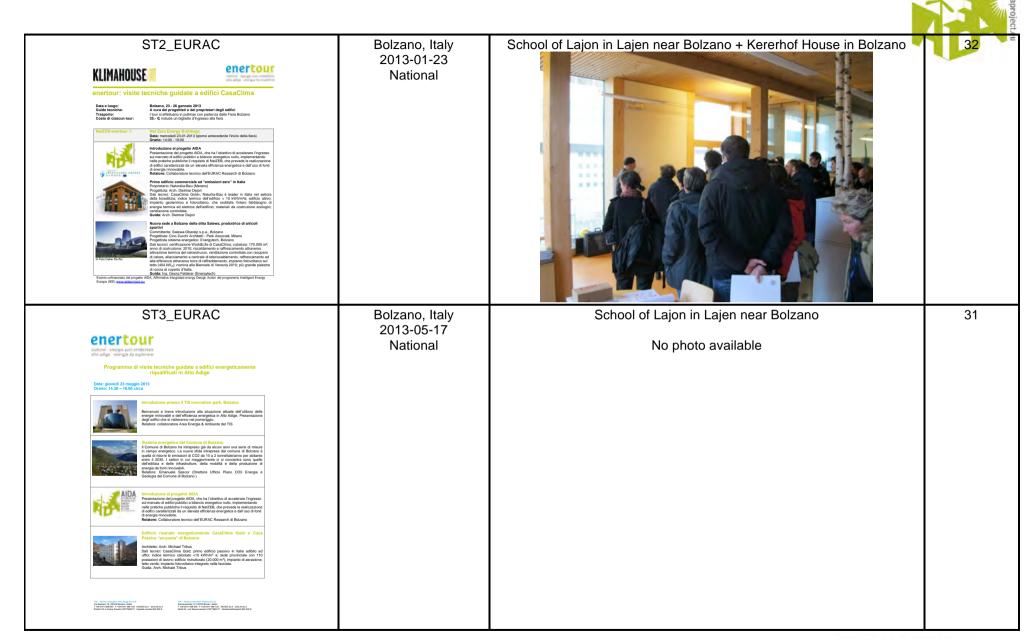
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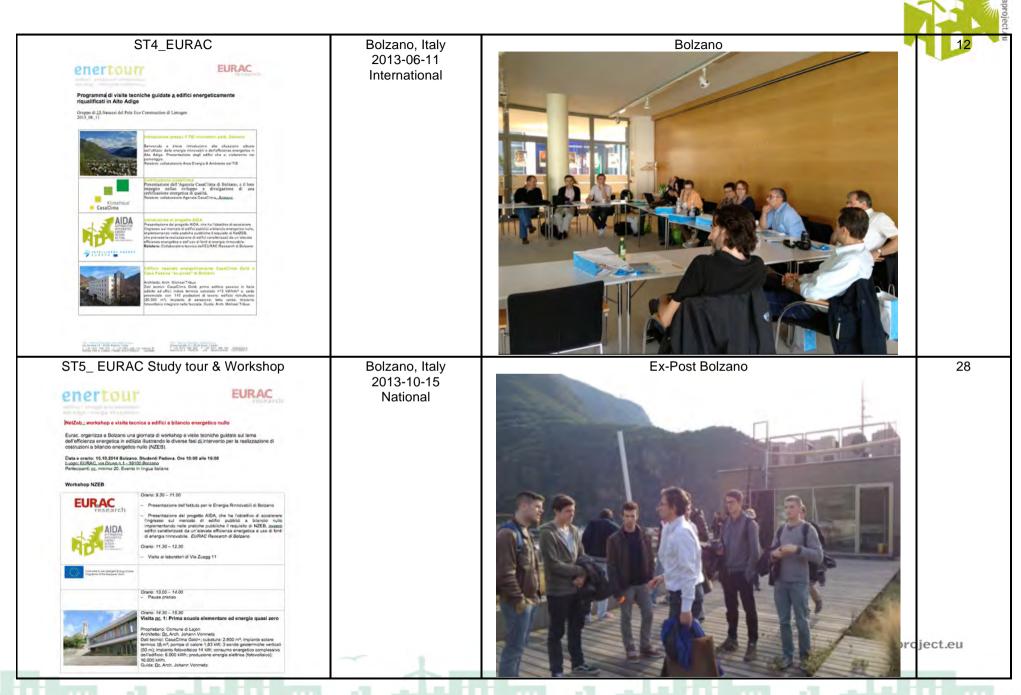
Table 4 Study tours in Italy

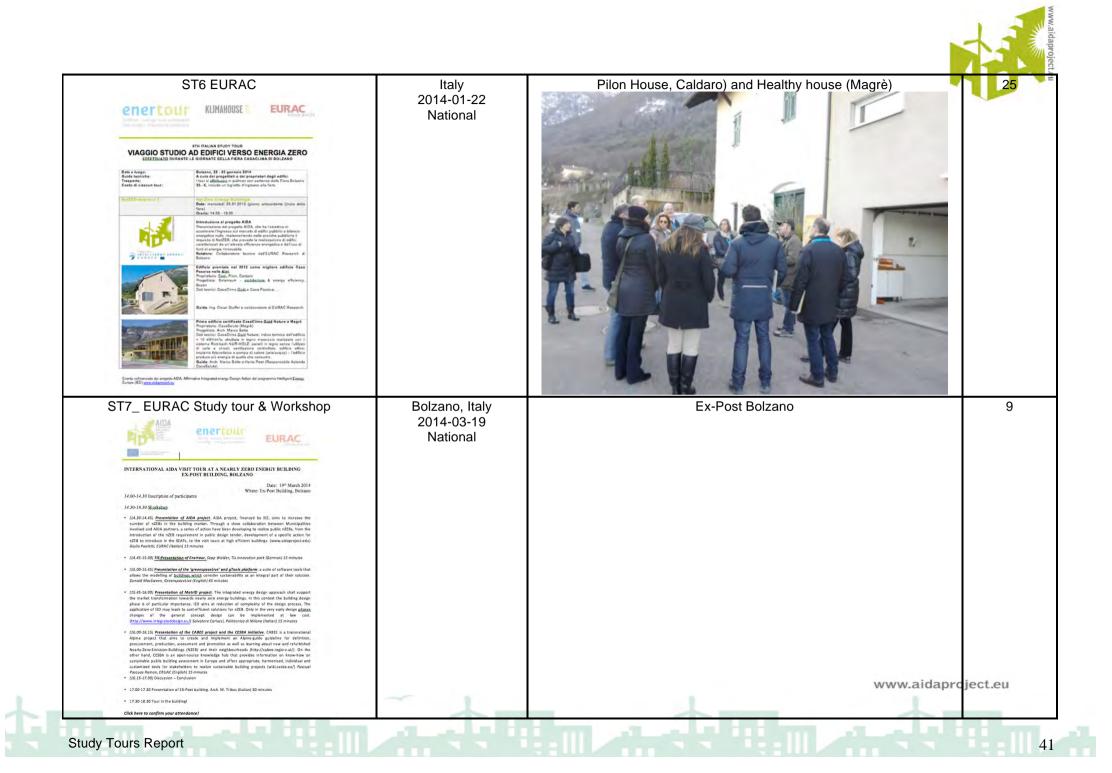
| Partner | Location, date, type | Building, Title, Comments | People |
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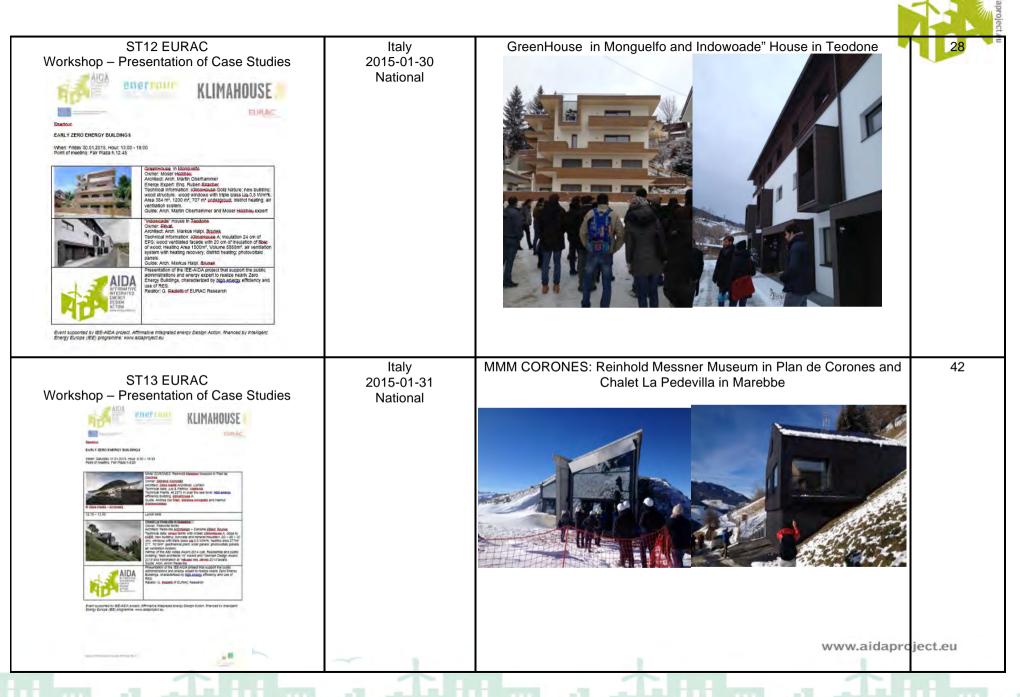
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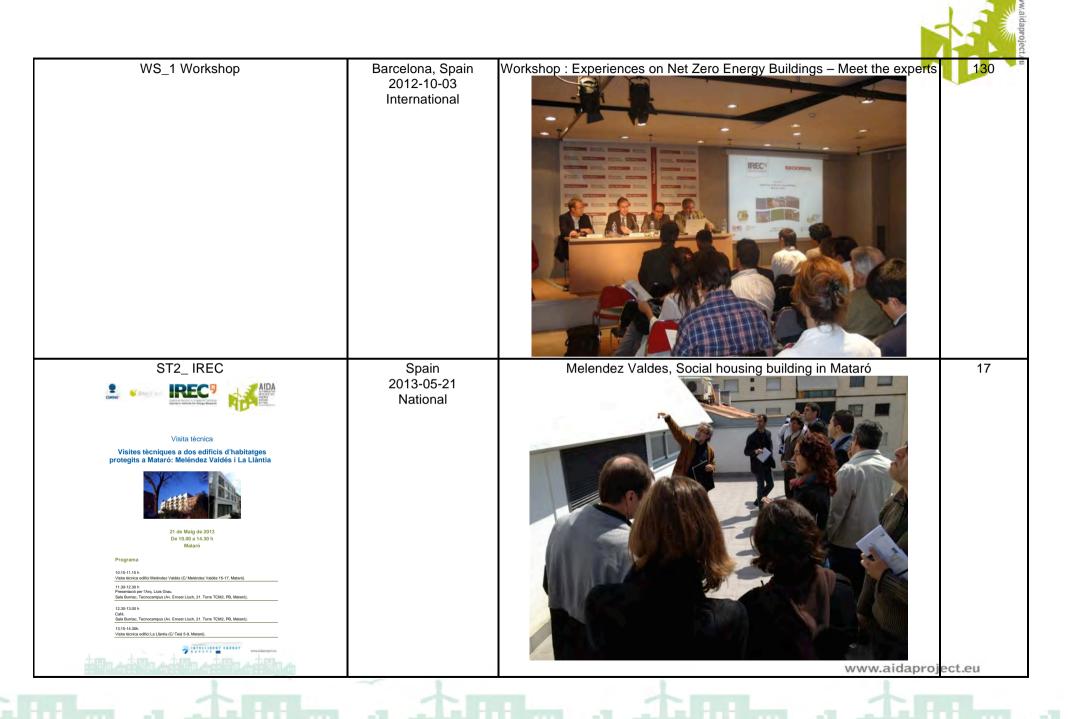
Spain

In Spain, AIDA partners organised 9 study tours. Study tours were very successful with high participation rates. To increase the accessibility of workshops to the target audience, they were sometimes held several days before or after building visits, and often in conjunction with events on relevant subjects, such as Construmat 2013 and energy Efficiency in Buildings conference – this also lead to very high participation rates. Overall targets for study tours in Spain were met, with 9 study tours and workshops and 867 participants.

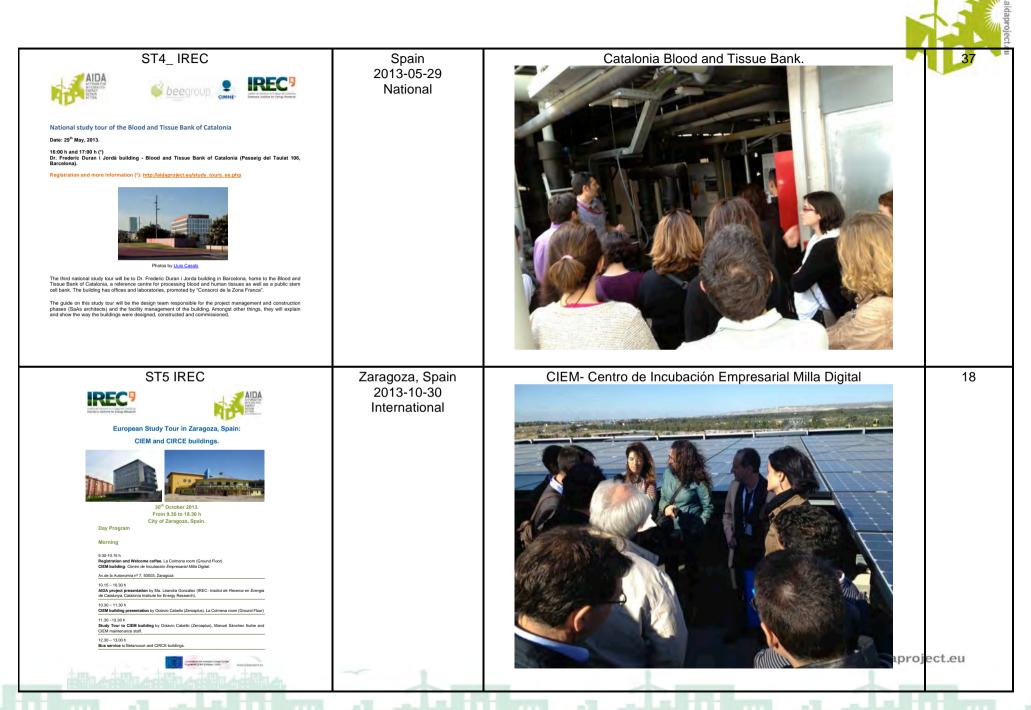
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Table 5 Study tours in Spain

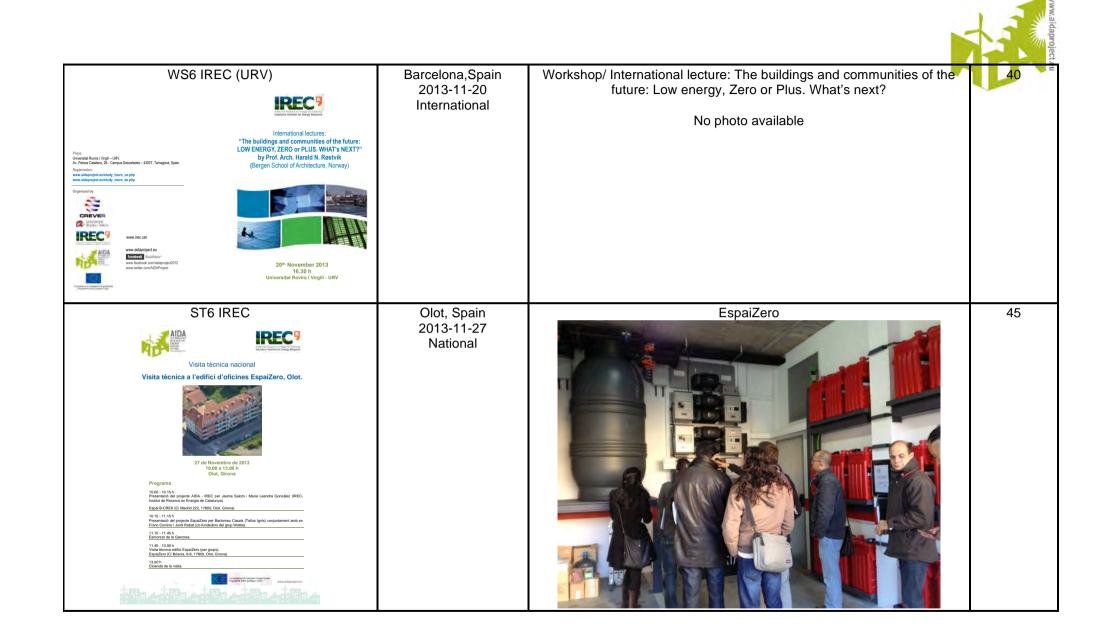
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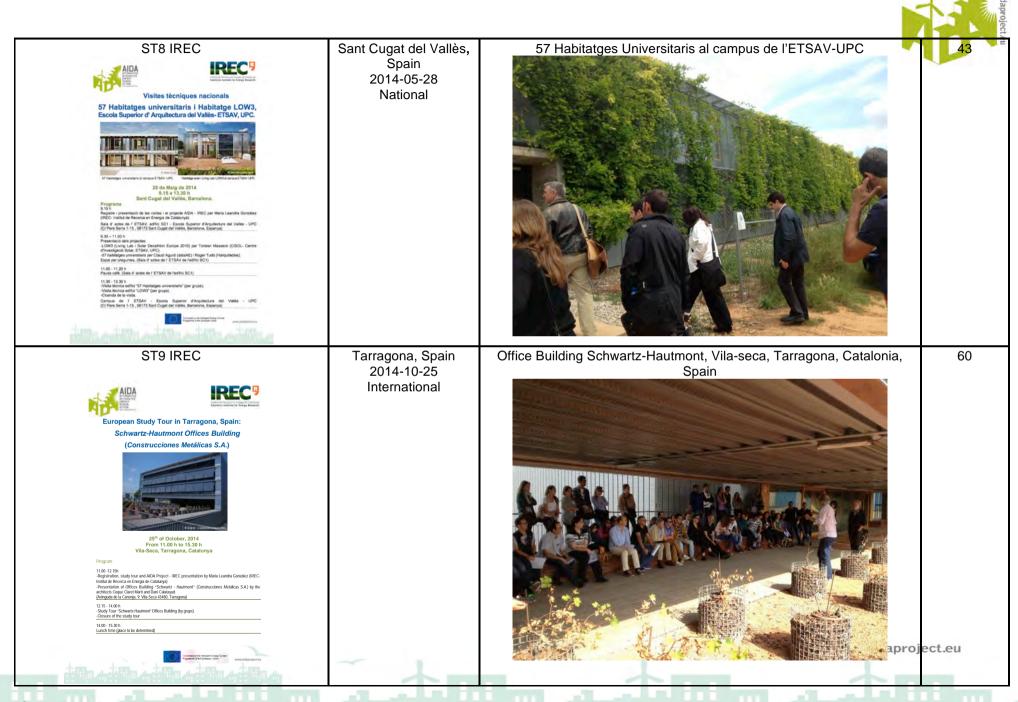




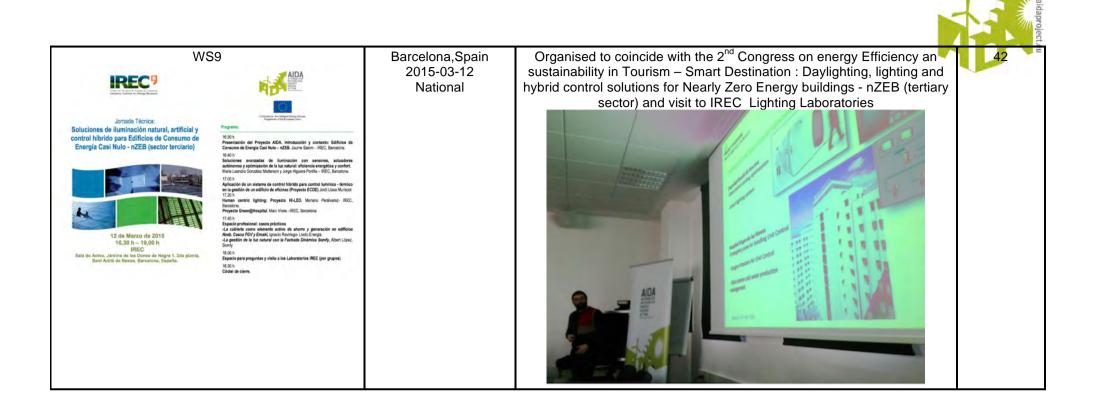


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United Kingdom

In the United Kingdom, AIDA partners organised 8 study tours. The organisation of study tours proved to be difficult, with very low participation rates for most visits, although opportunities for organising within the framework of relevant events such as the Green Buildings Week were exploited. Two Study tours stand out as having higher attendance than the others. The BRE Innovation Park provides a demonstration site for new technology for domestic new build and refurbishment. A number of the participants were there because they were planning a self-build home rather than being part of our target groups. This tour was also run in collaboration with the Matrid Project, which also helped to boost numbers. The Lews Castle is a high profile project where most of the attendees were interested in seeing the building rather than in nZEB.

In Total there were 10 study tours conducted with 154 participants. Participation in the tours was significantly lower than the target. Despite targeting Local Authorities specifically there was very little participation from this target group with no elected members at any of the Study Tours. In fact the

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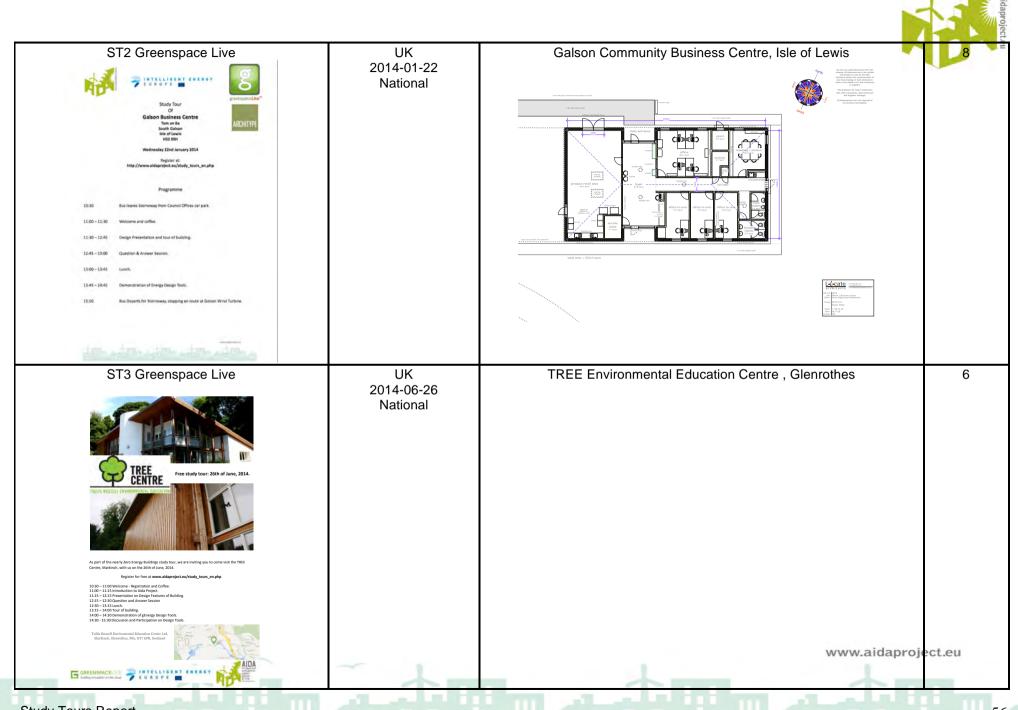


second tour of Lews Castle was organised following a specific request from the Building Control section of the Local Authority who had been unable to attend the first tour. They also asked that the tour focus on the more technical aspects of the energy efficiency of the building and plant. The date was arranged with them two weeks in advance, and they were contacted two days before the tour to confirm numbers. Despite this not one person from the Local Authority attended the tour. Overall targets for study tours in the United Kingdom were not met, with 8 study tours for 154 participants.

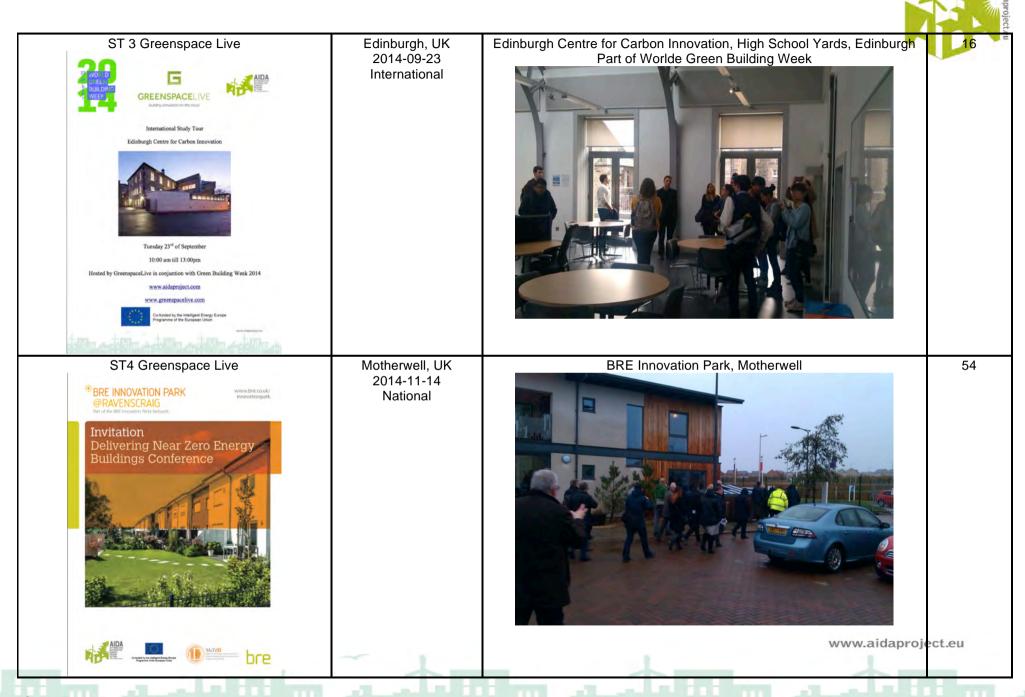
| Partner | Location, date, type | Building, Title, Comments | People |
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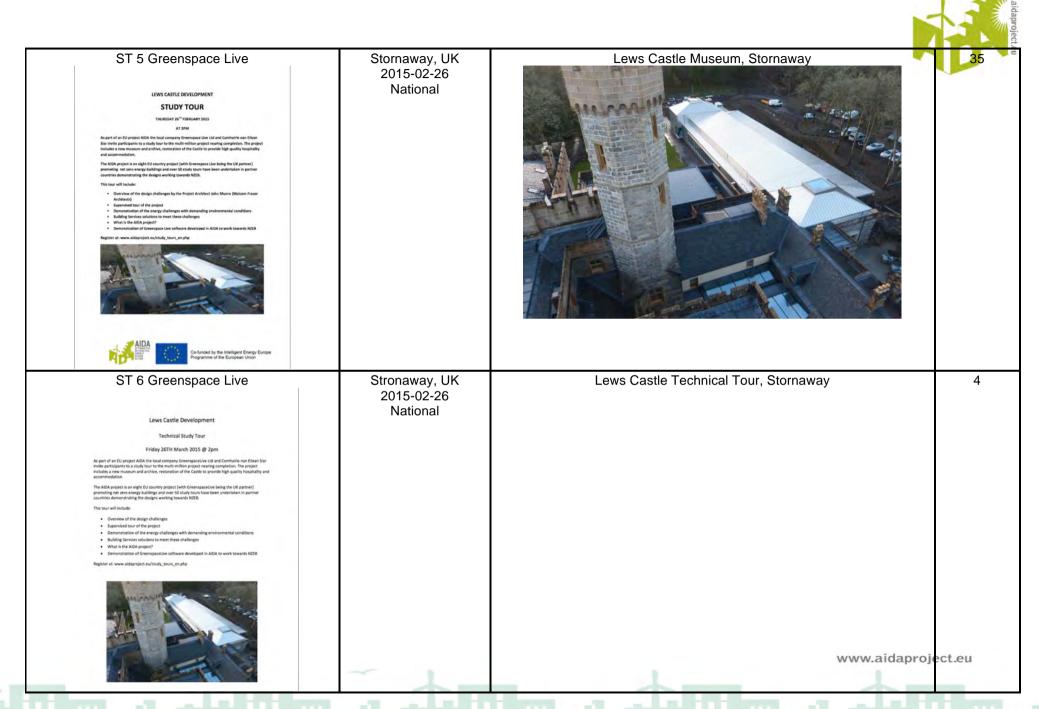
Table 6 Study tours in the United Kingdom

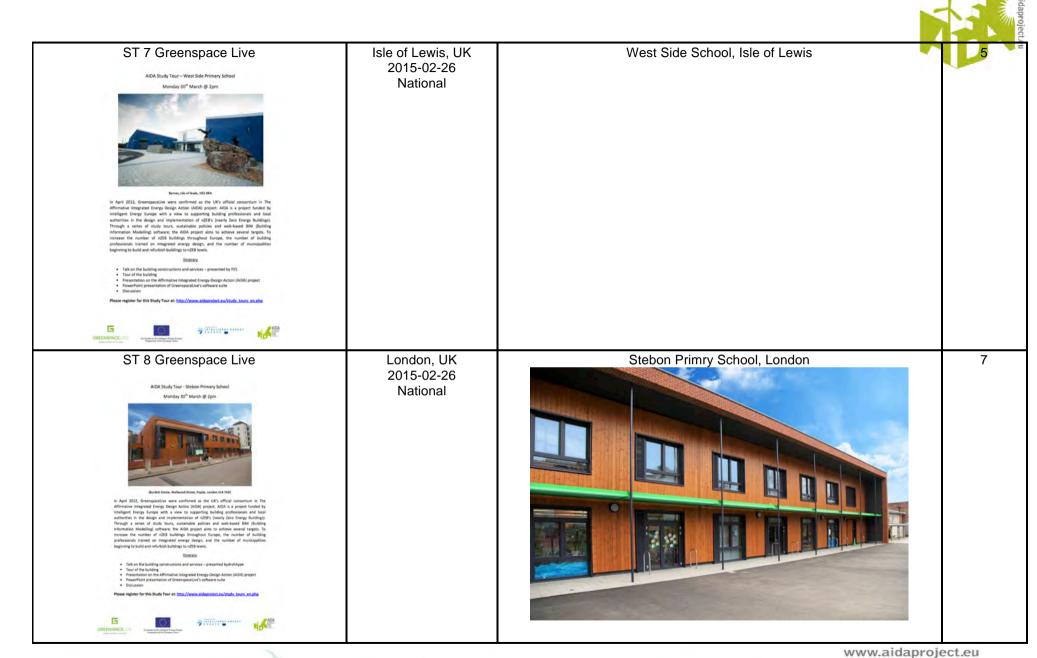
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Study Tours Report







Study Tours Report