

Energy Auditors Competencies, Training and profiles

O2 ENACT program and learning resources

Portuguese National Validation Report

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ENACT (ENERGY AUDITOR COMPETENCES, TRAINING AND PROFILES) PROJECT

Starting on the 1st of September 2014 and lasting for 24 months, ENACT is a European initiative which aims to contribute to the definition and implementation of a common frame for the professional qualification and competences of energy auditors.

Funded within the Erasmus+ programme, ENACT foresees the collaboration of training companies, energy agencies and professional qualification bodies coming from 4 different European countries: Italy, Portugal, Poland and Spain. The partners, under the coordination of the Italian training company AISFOR are: RENAEL (Italian Network of energy agencies), ADENE (Portuguese National energy agency), KAPE (Polish National energy agency), APADGE (Spanish Association on energy auditors) and INCOMA (Spanish training company).

In order to reach the main result of ENACT - common EU based qualification system for energy auditors and the integration and development of open educational resources and definition of training resources -the activities to be developed within the 24-month project period include:

- Analysis of the training programmes and qualification frames in the participating countries –including an overview of the various national and regional legislation for the transposition of the European Directive on energy performance buildings, the professional qualification system, the relative compulsory (formal) training as well as the informal and non-formal training;
- Comparative analysis of the various national frames to share the common issues as well as the best practices in order to define the “Energy Auditors Competencies and Professional Profiles”;
- Definition of the learning outcomes and program for the training of the energy auditors and of the relative ECVET (European Credit system for vocational education and training) as well as the relative learning resources and material;
- European and National validation of the professional figure of energy auditor as trained and qualified through the above-defined training and qualification process;
- Design and creation of an ENACT technology enhanced system, modules and tools to implement the above-defined training and qualification process.

DOCUMENT OVERVIEW

The validation activity in ENACT has been carried out in strong collaboration with selected national stakeholders to collect their input and feedback in order to:

- reinforce the embeddedness of the ENACT profile, curricula and ECVET based training program within the regional / national qualification frames.
- guarantee the energy auditors professional recognition, employability and (regional, national, European) mobility.

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- ensure the sustainability, in terms of professional profile validation and dynamic development.

The present document reports the results of the validation activity carried out in Portugal, focussed in the activities carried out, actors involved, evidences collected on profile and qualification schema and training program of the ENACT Energy Auditor, as well reporting the main outputs. The documents used for the validation were:

- ENACT Energy Auditor profile, activities and competences.
- ENACT Energy Auditor training programme,
- ENACT Energy Auditor checklist validation.

Further supporting resources have been used for the activity, such as customised presentations (text, slides, and documents), checklists and grids.

NATIONAL SCENARIO

The “Energy auditors - Competences and Professional Profiles” has been developed on the basis of national and compared analysis and research of scenarios, state of the art and best practices in addressing two main dimensions:

- Institutional, in terms of existing profiles and labour market dynamics, with special reference to the governance models (actors, tools and procedures), relevant for the targeted energy auditors profiles existing in the partners country. A deep and compared analysis on closed/ongoing researches and professional peer groups reports have been carried on;
- sectorial, in terms of relevant emerging scenarios in the targeted job segment of auditors and in the wider green job sector in terms of skills needs, learning outcomes and professional profiles. A map of existing educational and VET curricula and training programs have been also carried on.

The complete ENACT compared research, as well as national reports are available on the project website www.enactplus.eu.

Regarding the Portuguese national level, the analysis comprised 3 areas: institutional, legislative and national qualification framework, training of energy auditor and best practices. For each area, the highlights were as follows:

- **Institutional framework** - targeted in the identification of national energy policies, namely the implementation of national action plans on energy efficiency (PNAEE) and renewable energies (PNAER), as well as on the initiatives in the field of climate changes.
- **Legislative and national qualification framework** – the analysis was focused in the existing categories of energy auditors, with emphasis in the figure of expert on energy certification of buildings. For that purpose, it was considered the following items:
 - Legislative and regulatory framework
 - Associated training programmes

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- Criteria for entry level and competences/profile for certification process, as well as management entities.

The analysis also included a brief reference to other profiles related to the energy audit area, such as the local energy manager and the responsible to monitor and to ensure the accomplishment of mandatory commitments of the facilities and installations with intensive energy consumption.

- **Training of energy auditor** – regarding the expert on energy certification of buildings, the training is not compulsory; nevertheless, ADENE promoted training courses aiming to prepare and transmit the necessary knowledge in order to ensure an adequate preparation for the exam which is mandatory to get the qualification as expert on energy certification of buildings. In this context, with a national coverage (Lisboa and Porto) and for each category, the training offers include the following courses

In Portugal, there is a consolidated process for the training and qualification of energy auditor, namely at the building sector (residential and services). This was the result of several initiatives both from European Union and the Portuguese Government that is dedicating special attention to the energy sector, with focus on the energy efficiency and renewables.

ENACT VALIDATION AND STAKEHOLDERS INVOLVEMENT

According to the validation plan (O2A4), the Portuguese action:

- **Aimed** at collecting relevant feedback on the ENACT energy auditor profile and program in order to:
 - reinforce the embeddedness of ENACT profile, curricula and ECVET based programs within the regional / national qualification frames;
 - guarantee the energy auditors professional recognition, employability and (regional, national, European) mobility;
 - assure the sustainability, in terms of professional profile validation and dynamic development.
- was **carried out**:
 - at two levels, i.e., internal and external, and for that purpose a set of sessions was organized with:
 - **CT 184 “Gestão de Energia”**, a technical committee, coordinated by Portuguese Institute for Quality, which is responsible to follow the work developed by CEN and CENELEC.
 - **ADENE Buildings and Industry Departments** which have competences in the fields of management of national systems for energy certification of buildings and installations with high consumption of energy

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VALIDATION ACTION

With the **CT 184 “Gestão de Energia”**, two actions had been developed:

- a meeting (11 December 2015) with an agenda that included the presentation of ENACT project and of the profile and training program for ENACT Energy Auditor (annex). In result, 2 actions were carried out:
 - promote an ex-ante analysis and evaluation of “ENACT National and European profiles validation” by all the members of CT 184 “Gestão de Energia”.
 - include ENACT Energy Auditor as a topic of the agenda of the next formal meeting of the CT 184 “Gestão de Energia”, held in 11 January 2016.

With **ADENE Buildings and Industry Departments**, it was organized a meeting (17 December 2015) to present ENACT project and the proposal for Energy Auditor profile and competences (annex). The feedback was very positive, being the ENACT initiative considered as in line with their objectives in the field of energy audits.

RESEARCH OUTPUTS

The comments and inputs collected throughout the validation activity on the various issues were very differentiated and or diversified. In this frame, they will be reported by stakeholder and is indicated below:

CT 184 “Gestão de Energia” - as a general comment, they issued the following statement:

- *“CT184 states/declare their availability to support in which that can be considered as necessary, as well the interest of ENACT project.*
- *However, tacking in account the frame of CT 184 is the Energy Management in a comprehensive approach, it was considered not pertinent to comment to the document, as ENACT project focus in the residential sector”.*

CT 184 “Gestão de Energia” members issued the following comments and suggestions:

ENACT Energy Auditor profile and training program	<ul style="list-style-type: none"> • Should be articulated with the profile of qualified expert on energy certification of buildings. • The Norm ISO 50002 should be considered as a reference for measurement and calculation of data. • to add MTDs - “Best Available Techniques Reference Documents” - “BREFs”
Potential adoption in the national/regional professional and training system	<ul style="list-style-type: none"> • it was suggested that it should be integrated in the NQF
Entry criteria	<ul style="list-style-type: none"> • The criteria should include requisites such as academic background, professional experience, etc.).

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Furthermore, from the meetings and inputs received, as a general appointment, CT 184 consider that the profile of an energy auditor should follow the guidelines of ISO 50002.

ADENE Buildings and Industry Departments – the comments and suggestions were as reported in the table below.

ENACT Energy Auditor profile and training program	<ul style="list-style-type: none"> to add ISO 50002 as theme of the contents of the training programme. to add information about ISO 50002 and Analysis Methods referred by EN 16247.
Entry criteria	<ul style="list-style-type: none"> the need to define more consistent entry level requisites, for example, students having “other degree” as academic background should detain relevant professional experience.

MAIN FINDINGS

The comments gathered during the meetings and interactions with the stakeholders above mentioned permitted to foresee that ENACT Energy Auditor approach will have their support and they also consider that could be the baseline for the creation of the energy auditor in the residential sector.

Furthermore, it should be highlighted that the main findings were as follows:

- the feedback and inputs received were few and dispersed.
- the main checklist points addressed were:
 - additional contents to training programme, with focus on ISO 50002
 - the need to define a higher level entry
 - the importance to create the conditions in order to integrate in the NQF

ANNEXES

- CT 184 inputs
- ENACT presentation ADENE (meeting with ADENE buildings and industry departments)
- ENACT presentation CT 184 (meeting with representative of CT 184)
- Stakeholders inputs (CT 184 and ADENE buildings and industry departments)