

62nd International Scientific Conference of Riga Technical University
“Scientific Problems of Engineering Economics of Construction and Real Estate Management,
Regional and Territorial Development”



Project “From Housing Manager to Climate Manager” (CLI-MA)

COMPARISON OF HOUSING MANAGEMENT IN GERMANY, POLAND AND LATVIA

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Actuality:

Only a part of the multi-apartment residential buildings corresponds to modern energy efficiency requirements, therefore, renovation should be performed.

This can be reached by involvement of the housing managers that are responsible for building management. However, housing managers often lack the knowledge and skills to initiate and implement such projects.

EUKI already financed project “Klimaverwalter” within the framework of which, an innovative training scheme was developed and introduced for the acquiring the necessary competences for housing managers.

The aim: to understand how to improve the existing training and/or education system through knowledge transfer from Germany by adapting it to Latvian and Poland situation.



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Content of comparison

I Existing training system for housing manager

- Is the qualification of the housing managers compulsory?
- Compulsory or not-compulsory training/education system?
- How does the existing training affect the rate of renovations?

II Role of housing manager

- Are the housing managers represented by a central or regional associations or other kind of interest groups?
- Who is politically responsible for housing management?
- Should administrators be authorized to conduct administrating activities?
- Is the administrator a manager or an expert?
- Can the administrator influence building renovation?

III CLI-MA Project related questions

- Goal of the training for climate managers
- What skills of administrator should be developed or deepened in training



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I Existing training system for housing managers

Is the qualification of the housing managers compulsory?

Germany	Poland	Latvia
<p>yes</p> <p>from 2022 for home ownership management</p>	<p>no</p>	<p>yes</p> <p>Education and professional qualification requirements for housing managers are determined in the Law on Administration of Residential Buildings.</p> <p>For the management of multi-apartment buildings: <u>necessary is professional education and a document certifying at least a fourth level professional qualification.</u></p> <p>In some cases, a third level professional qualification is sufficient</p>

I Existing training system for housing manager compulsory or not compulsory training?

Germany	Poland	Latvia
<p>not compulsory</p> <p>the draft regulation specifying the implementation of the qualifications required by law has not yet been published</p> <p>Real estate agent 880 hours, Home ownership management 80 hours</p>	<p>not compulsory</p> <p>Associations of building managers provide basic vocational training for managers The course program is based on the program prepared on the base of CEPI-CEI (European Real Estate Council) course. The course is organized in the form of four weekend meetings, during which 60 educational hours are carried out</p> <p>Other associations also offer training courses that help raise the qualifications of its members. Currently, these are on-line trainings lasting from 4 to 8 hours</p>	<p>compulsory</p>



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Education and Professional Qualification of Housing Managers in Latvia

Residential House Management Law (*Section 13. Vocational Qualifications of the Administrator of a Residential House*):

A person is entitled to perform the management task in a multi-apartment building if he or she has acquired the vocational education necessary for the management of residential houses and a document certifying at least a fourth level professional qualification.



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Levels of Qualification in Latvia

- The Latvian Qualifications Framework (LQF) is a state-level referencing system where all qualifications awarded in the Latvian education system are arranged in levels.
- The structure and functions of LQF were developed on the basis of the European Qualifications Framework (EQF) and taking into account the context and traditions in Latvian education, as well as stakeholders' interests.
- The Latvian Qualifications Framework is a system of eight levels comprising all education levels
- The LQF level descriptors are based on learning outcomes that are expressed in three dimensions:
 - Knowledge (knowledge and comprehension);
 - Skills (ability to apply knowledge, communication, general skills);
 - Competence (analysis, synthesis and assessment).



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Education Documents and LQF Level

Education documents (qualifications)	LQF Level
Certificate of general basic education (special education programmes for learners with (severe) mental development disorders or multiple severe developmental disorders)	1
Certificate of general basic education Certificate of vocational basic education Certificate of professional qualification (at basic education level)	2
Certificate of vocational education Certificate of professional qualification (at vocational education level)	3
Certificate of general secondary education Diploma of vocational secondary education Certificate of professional qualification (at secondary education level)	4
Diploma of first level professional higher education (college education, length of full-time studies, 2 to 3 years)	5
Bachelor's diploma Professional Bachelor's diploma Diploma of professional higher education, diploma of higher professional qualification (length of full-time studies is at least 4 years)	6
Master's diploma Professional Master's diploma Diploma of professional higher education, diploma of higher professional qualification (total length of full-time studies is at least 5 years)	7
Doctor's diploma Professional Doctor's diploma in arts	8

Education and Professional Qualification of Housing Managers

- **Housekeeping supervisor (LQF 4)**

Houskeeping supervisor, under guidance of the housing manager, ensures management and physical preservation of buildings and other structures and physical preservation and technical maintenance of adjoining territories, functionally necessary plots of land, and environmental objects

- **Housing manager (LQF 5)**

Housing manager plans, organises, and leads operation work, renovation, reconstruction, and restoration of the housing and adjoining territory, as well as prevents damage according to the specific features of the object and ensures record-keeping of the real estate.

- **Real estate manager (LQF 6)**

Real estate manager plans, leads, and controls a technical survey of the real estate, technical servicing of the real estate and the territory adjoining it, and prevention of damage, as well as organises, leads, and controls development of financial accounting, administration budget, renovation (repair) estimates, and related documents, and organises work with cooperation partners and customers.



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Educational institutions and education programs in Latvia

Educational institution	Education program
Housekeeping supervisor (study course 960 hours)	
SIA "BUTS"	"Trade and Management of Real Estate" (30T 431 03)
SIA "Juridiskā koledža"	"Trade and Management of Real Estate" (30T 431 03)
"Komplekss Citadele" SIA Vocational Study School "Citadele"	"Trade and Management of Real Estate" (30T 431 03)
Riga International School of Economics and Business Administration (RISEBA)	"Trade and Management of Real Estate" (30T 431 03)
Housing manager (study program 2-3 years)	
Riga Technical University (RTU)	"Real Estate Management" (41581)
SIA "Juridiskā koledža"	"Real Estate Management and Administration" (41345)
Information System Management University of Applied Sciences (ISMA)	"Real Estate Entrepreneurship" (41345)
Real estate manager (study program 2-4 years)	
Riga Technical University	"Real Estate Management" (42581) — professional bachelor
Riga Technical University	"Civil Construction and Real Estate Management" (47581) — professional master



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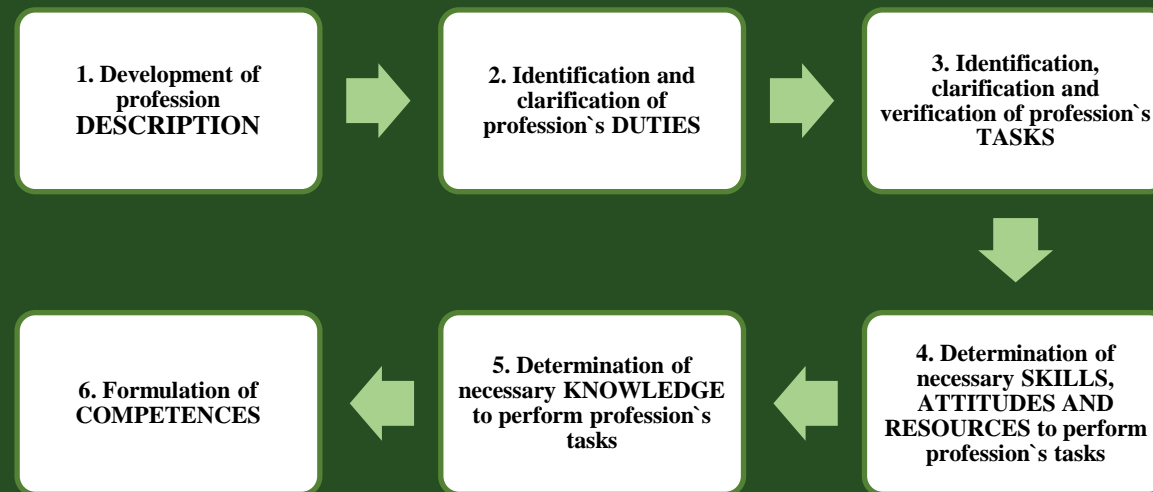
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Methodology for the development of professional qualification description



Housing manager Duties

1. Maintenance of Building Constructions, Engineering Networks, and Adjacent Territories
2. Sanitary Upkeep of Buildings and Adjacent Territories
3. The Provision of the Energy Efficiency Requirements
4. Organisation of Management Works
5. Organisation of Supplementary Services
6. Compliance with the Rules on Social and Personal Security



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Housing manager

The Provision of the Energy Efficiency Requirements Tasks

- Meeting the required energy efficiency targets
- Organising activities for implementing the required measures on increasing energy efficiency
- Ensuring that the engineering systems of the building are inspected
- Ensuring the performance of activities for increasing energy efficiency
- Ensuring the energy certification of buildings



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Housing manager

The Provision of the Energy Efficiency Requirements Competences

- The ability to organise the satisfaction of the energy efficiency requirements and the implementation of measures for increasing energy efficiency in accordance with laws and regulations
- The ability to ensure the energy certification of the building in accordance with laws and regulations
- The ability to ensure the inspection of the engineering systems of the building in accordance with laws and regulations



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I Existing training system for housing manager

How does the existing training affect the rate of renovations?

Poland	Latvia
<ul style="list-style-type: none"> • None of the training covers topics related to energy efficiency in relation to the internal climate of the building and increasing internal thermal comfort. • Even training on issues related to energy use treats them rather in the context of presenting the applicable regulations and requirements than as necessity to undertake measures to reduce energy demand, emissions and to improve thermal comfort. 	<p>Current education focuses more on management activities and less on energy efficiency measures.</p> <p>According to the Law on Administration of Residential Buildings main Management Activities are:</p> <ul style="list-style-type: none"> • The sanitary servicing of the residential house; • The supply of thermal energy, natural gas, provision of water supply and sewerage, removal of household waste; • The provision of electricity; • The survey, technical servicing, and current repair; • The provision of the fulfilment of the <u>minimum</u> energy efficiency requirements • The preparation of a management work plan; • The preparation of the relevant annual draft budget; • The organisation of financial accounting; • Keeping of the file of the residential building; • Entering into a contract with the owner of the land; • The provision of information to state authorities and institutions

II Role of housing manager

Representing associations

Political responsibility for housing management

Germany	Poland	Latvia
<p>VDIV Deutschland e.V. - the largest industry association representing the interests of property managers with 10 regional associations Membership is voluntary.</p> <p>Different aspects are covered by different federal ministries:</p> <ul style="list-style-type: none"> • Home Ownership Law: Ministry of Justice; • Construction: Ministry of the Interior; • SMEs and subsidies: Ministry for Economic Affairs. 	<p>Over 20 local associations and 4 Federations of associations active on the market. Membership is not obligatory.</p>	<p>The Association of Management and Administration of Latvian Housing (AMALH) is a public organisation that unites natural and legal persons in all Republic of Latvia. Membership is not obligatory.</p> <p>The Ministry of Economics is the leading national regulatory authority in the field of housing.</p>

II Role of housing manager

Should administrators be authorized to conduct administrating activities?

Germany	Poland	Latvia
<p>Administrators need to meet 4 criterions:</p> <ul style="list-style-type: none"> • need to have a professional liability insurance • need to have controlled financial circumstances • a certain level of liability is required (no conviction of theft, scam, embezzlement, blackmail, money laundering, forgery of documents or stealing within the last five years) • requirement for further education (at least 20 h within three years.) 	<p>The administrator is legal person who has a signed contract with building owner. No special education or trainings are required.</p>	<p>According to the <i>Law on Administration of Residential Buildings</i>:</p> <ul style="list-style-type: none"> • professional education and a document certifying at least a fourth level professional qualification • a duty for the manager, who has concluded a management contract with the residential building's owner and obtained the required qualification, <u>to register with the Register of Managers of Residential Buildings</u>

II Role of housing manager

Can the housing manager influence building renovation?

Germany	Poland	Latvia
<p>Yes, but for this the property manager needs extensive technical and methodological knowledge in order to be able to accompany and support decision-making processes of the homeowners' association.</p>	<p>Manager <u>can only suggest</u> the owner what renovation activities are needed, but the decision is always taken by the owner.</p>	<p>Housing manager can influence building renovation not directly:</p> <ul style="list-style-type: none"> • HM <u>can inform</u> about the need for renovation and the positive aspects of renovation. • HM <u>cannot take a decision</u> regarding renovation (the decision is taken by owner) • HM <u>can organize</u> the process but cannot do construction and supervision of construction.



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III CLI-MA Project related questions

Goal of the training for climate managers

What skills of administrator should be developed or deepened in training?

Germany	Poland	Latvia
<p>Empowerment of property managers:</p> <ul style="list-style-type: none"> • to initiate energy refurbishment measures as part of long-term refurbishment strategies, • to professionally support the decision-making process of the Homeowner Associations for the implementation of energy refurbishment measures • to accompany the implementation of the measures and to evaluate their sustainability 	<p>To build-up skills of housing managers in initiating, proper management and fund raising for climate-oriented renovation of multifamily buildings. Development and implementation of training curricula for housing managers can speed the renovation activities. Topics related to energy efficiency and internal climate are new in present training offered to managers and should be interesting to those who want to improve their qualifications, i.e. members of associations in the first place.</p> <p>The 24 hours course covers issues, which are not included in existing courses :</p> <ol style="list-style-type: none"> 1. energy efficient modernisation of buildings is important from the point of view of climate change and it's mitigation needs 2. how to prepare, implement and monitor properly the energy efficient modernisation 3. how to create the financing plan 4. how to communicate the goals of the climate management 	<ul style="list-style-type: none"> • To raise knowledge and skills of housing managers in the fields of energy efficiency and climate. • Development and implementation of training curricula for housing managers strengthens the implementation of EU directives concerning strategies of buildings renovation. <p>For the successful implementation of energy efficiency measures for buildings, housing managers need competence in technical, legal, financial, organisational, social, information exchange and other issues. The acquisition of these competences should constitute a training course programme covering all these aspects.</p>



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Further Project steps

	Year	Responsible	2021		2022			
			3rd quarter	4th quarter	1st quarter	2nd quarter	3rd quarter	4th quarter
Output III	Preparation and implementation of training curricula for the climate managers in Poland and Latvia							
Activity III.1	Shaping the national training structures in Poland and Latvia, methods and means of training, detailed curricula prepared by experts	FPE for PL RTU for LV						
Activity III.2	Preparing and conducting pilot training in Poland and Latvia	FPE for PL RTU for LV						
Activity III.3	Making the necessary adjustments to the training scheme and curricula	FPE for PL RTU for LV						
Activity III.4	Preparation and conducting of project partners' meeting in Poland for exchange of results	FPE						



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