

11 June 2026



MEES Masterclass

Navigating uncertainty for local authorities

Russell Smith, Director, Energy
Liz Lainé, Head of Strategy and External Affairs
Noah Simmonds-Upton, Senior Energy Analyst
Megan Mann, Service Delivery Manager, Ecofurb



Providing confidence for retrofit investment for 20 years

Software and solutions to navigate the regulatory landscape, while doing the right thing for homes, residents and your asset strategy

Cotality has been supplying quality assurance, mobile surveying and workflow management software to the UK energy efficiency sector for the last 20 years.

Today's presenters:

- Russell Smith
- Liz Lainé
- Noah Simmonds-Upton
- Megan Mann

320+

local authorities,
registered providers
and estate managers

2 million+

homes analysed for
retrofit by landlords

82%

SHDF funded
schemes

50%

homes been
assessed for their
Local Authorities

First

National One-Stop-
Shop for the 'Able-
To-Pay'

28.9 million

digital twins to support
analysis by policy-makers and
programme developers

Agenda

Aims
Recognise Uncertainty
Communicate Logic
Enable Risk Management

Focus
Private Rented Sector
Briefing on social housing
available on request

01 The Knowns and Unknowns

02 Navigating EPC Reform

03 Identifying High Risk Homes

04 One Stop Shop for Landlords

01



The Knowns and Unknowns

The Known Unknowns

35% - 50% of private rented homes are below EPC C+ at present

Dominated by pre-1919 houses, mainly in the Midlands and the North

Knowns

- Compliance by 1 October 2030 via
 - Energy Efficiency Rating by 1 October 2029
 - Current EPC C standard – RdSAP
 - EER Band C - HEM
 - Fabric Performance and
 - Heating System or
 - Smart Readiness
- Exemptions, including
 - All relevant improvements made
 - Negative impacts: Devaluation and Solid Wall Insulation
 - Third party consent – incl tenant
 - Cap at £10,000 on each home, incl VAT, A&A, PAS costs, EPC costs and certain grant funding – reduced for lower value homes

Unknowns

- Impact of RdSAP to HEM transition on...
 - Energy Efficiency Rating
 - Fabric Performance
- Details of the new metrics
 - How measured
 - What is a Band C?
- Application of the exemptions across multiple metrics
- Evidencing valuation, pricing of works, tenant consent

If you takeaway one slide

- Wait and see is not a strategy
- Exemptions are broad and not (yet) fully defined
- Cheapest compliance for many may be to lodge an EPC in next 12 months
- Want to be proactive?
 - Advice before enforcement
 - Data should not be a barrier



02



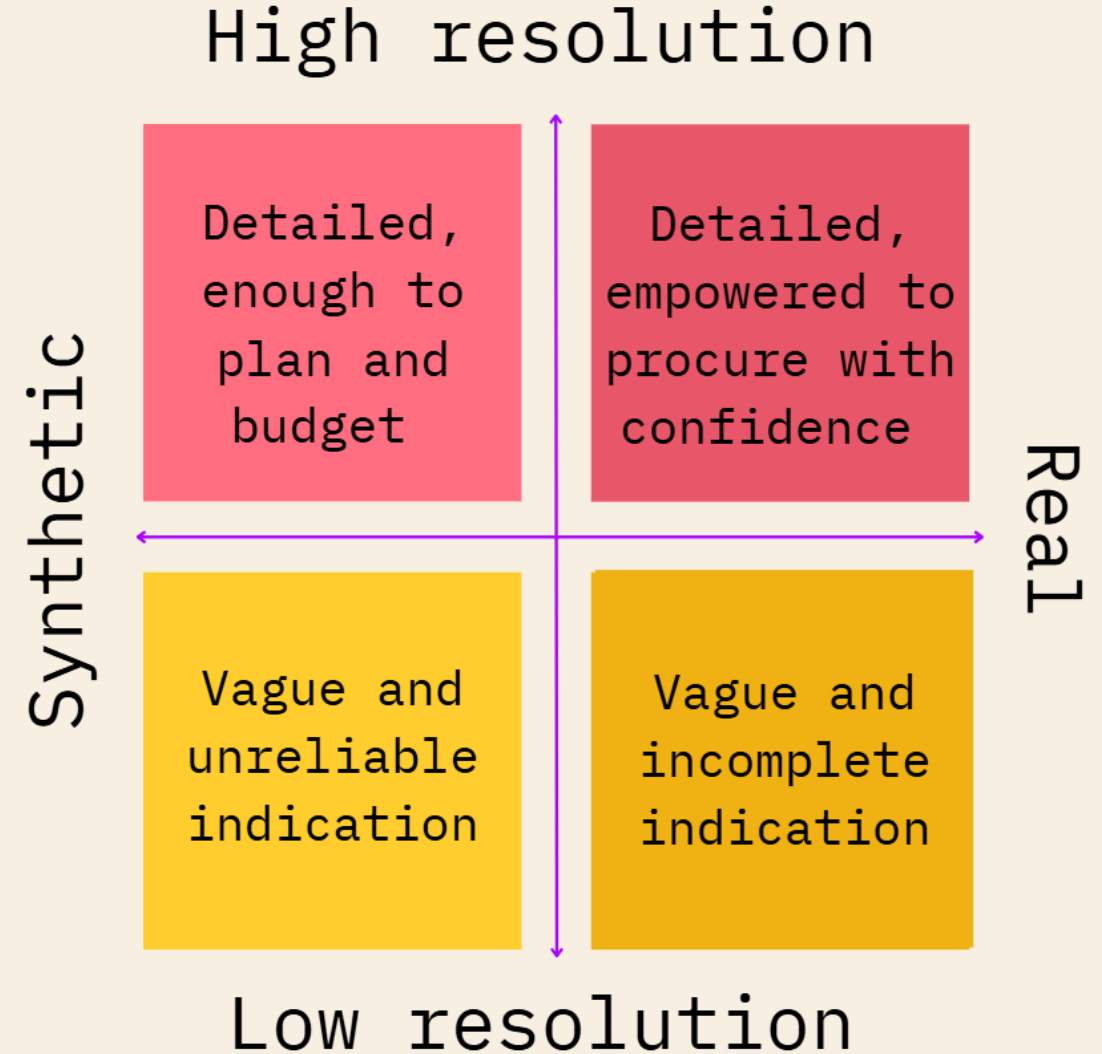
Navigating EPC Reform

Bridging Data Gaps

From RdSAP to HEM

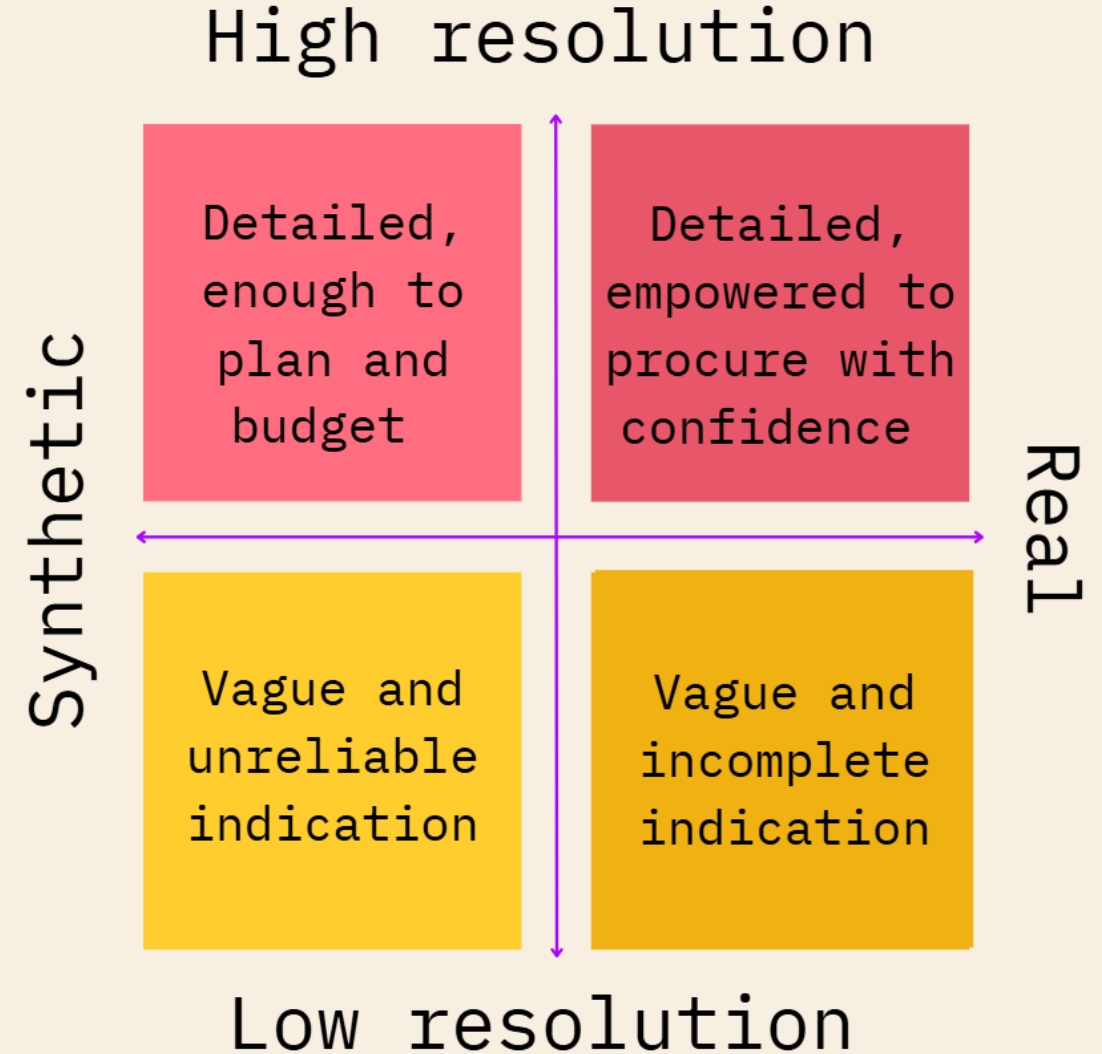
Data Quality

- Data has long been a barrier
- Our data quality matrix recognises variation in the sector:
 - Real: survey data
 - Synthetic: extrapolation or archetypal data
 - High resolution: full RdSAP (HEM incoming)
 - Low resolution: summary inputs
- The higher the resolution, and the more 'real' the dataset, the more confidence you can have in decision-making.
- We help by
 - Daily refresh from EPC register (and ECMK EPRs + RAs)
 - Filling gaps:
 - Open data and transparent logic
 - Landlord provided data



Detail matters

- Government points landlords to EPC recommendations, but this is low resolution:
 - Are not optimised for MEES
 - Measure hierarchy > goals
 - Based on limited options, and low-res synthetic pricing
 - May be out of date due to change in the home or technologies
 - Do not consider ventilation
- Landlords want to make choices based on
 - Their goals – compliance but also cost, Decent Homes, bills?
 - Constraints – planning, supply chain, funding, consents
 - And minimise spend – incl exemptions as a factor
- Confidence in these decisions is strengthened by
 - High resolution – full RdSAP (in future RdHEM or HEM:EX)
 - Real, or synthetic data based on transparent sources



The HEM Timeline

Official Government Roadmap

No official HEM methodology currently exists for assessing existing homes or converting RdSAP data.

Guidance is expected later in 2026, with the HEM framework for existing dwellings not due to go live until H2 2027.

In the meantime, any “HEM results” are indicative only, based on test models, as the official regulatory API is not yet available.

Our Indicative HEM will be available soon.



Indicative HEM

Incorporating HEM into Cotality's Retrofit Intelligence

- Converting full RdSAP datasets into HEM
 - Indicative HEM outputs to support MEES risk assessment
 - Maintain version control and data integrity through transition
 - Dual method modelling with consistent input to assess least cost route to compliance
-
- Baseline reports: Indicate HEM results and assess MEES risk
 - Scenario modelling: Advice on every home
 - Advice Service: Portfolio and single home advice for landlords

Coming soon to Portfolio, Pathways, Net Zero Hub and Surveyor Pro



03



Identifying high risk homes

Process

Practice

Risk Assessment

Process



4 routes to compliance with 5 metrics

Note: subject to further policy decisions



EER x RdSAP

Compliant under EER C, while RdSAP still supported

Must meet primary metric under HEM by EPC expiry date

Second metric by 2039



Heating System

Consultation proxy: heat pump

may recommend installing a heat pump, improving heating controls or improving radiators.



EER x HEM

Compliant under EER C before 1 October 2029

Must meet MEES under new EPC metrics by end of validity period (latest 31/9/2039)



Smart Readiness

Consultation proxy: Solar PV

may recommend installing measures such as smart meters, solar panels, heat batteries, and other load-shifting appliances.



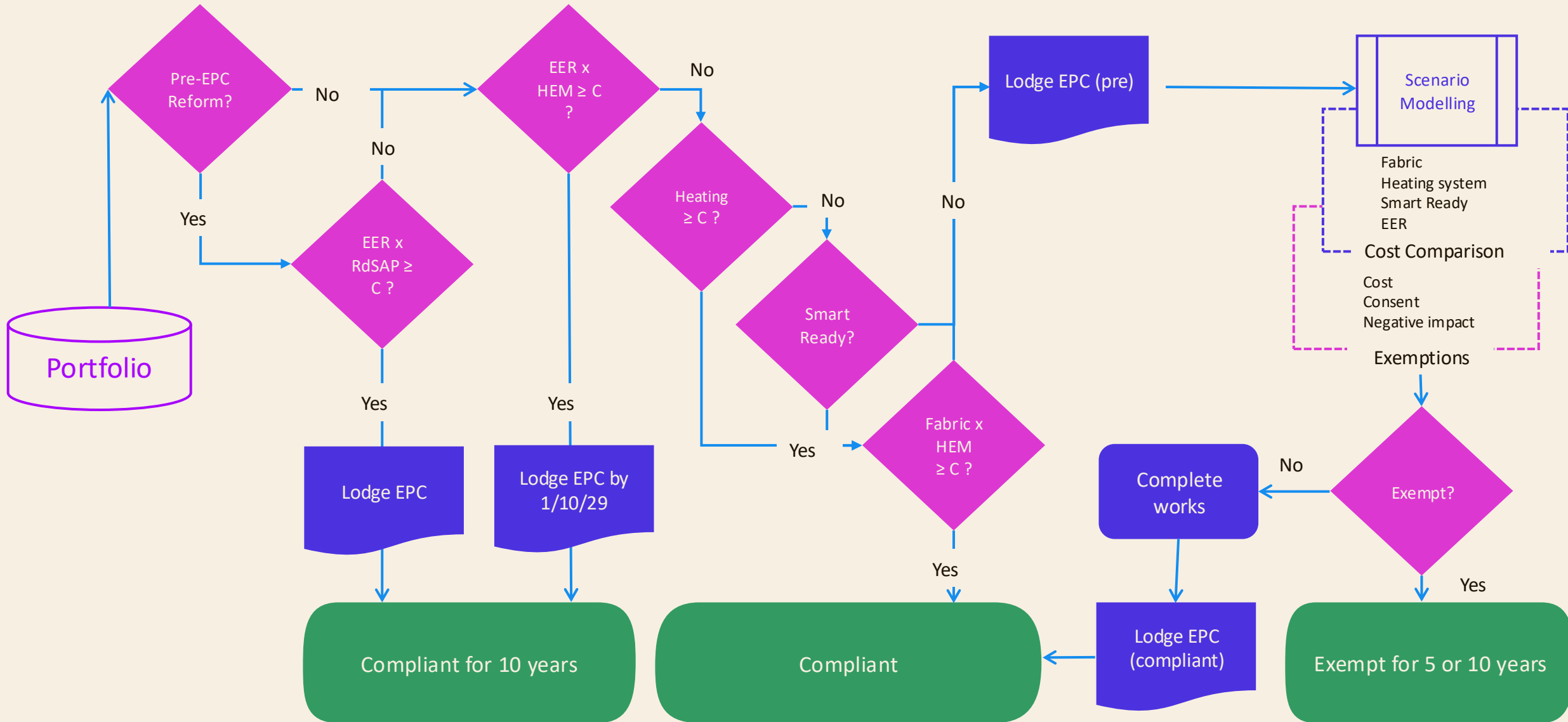
Fabric Performance

Policy decisions based on heat loss parameter, tightened from tightening from 4 W/m²k to 3 W/m²k

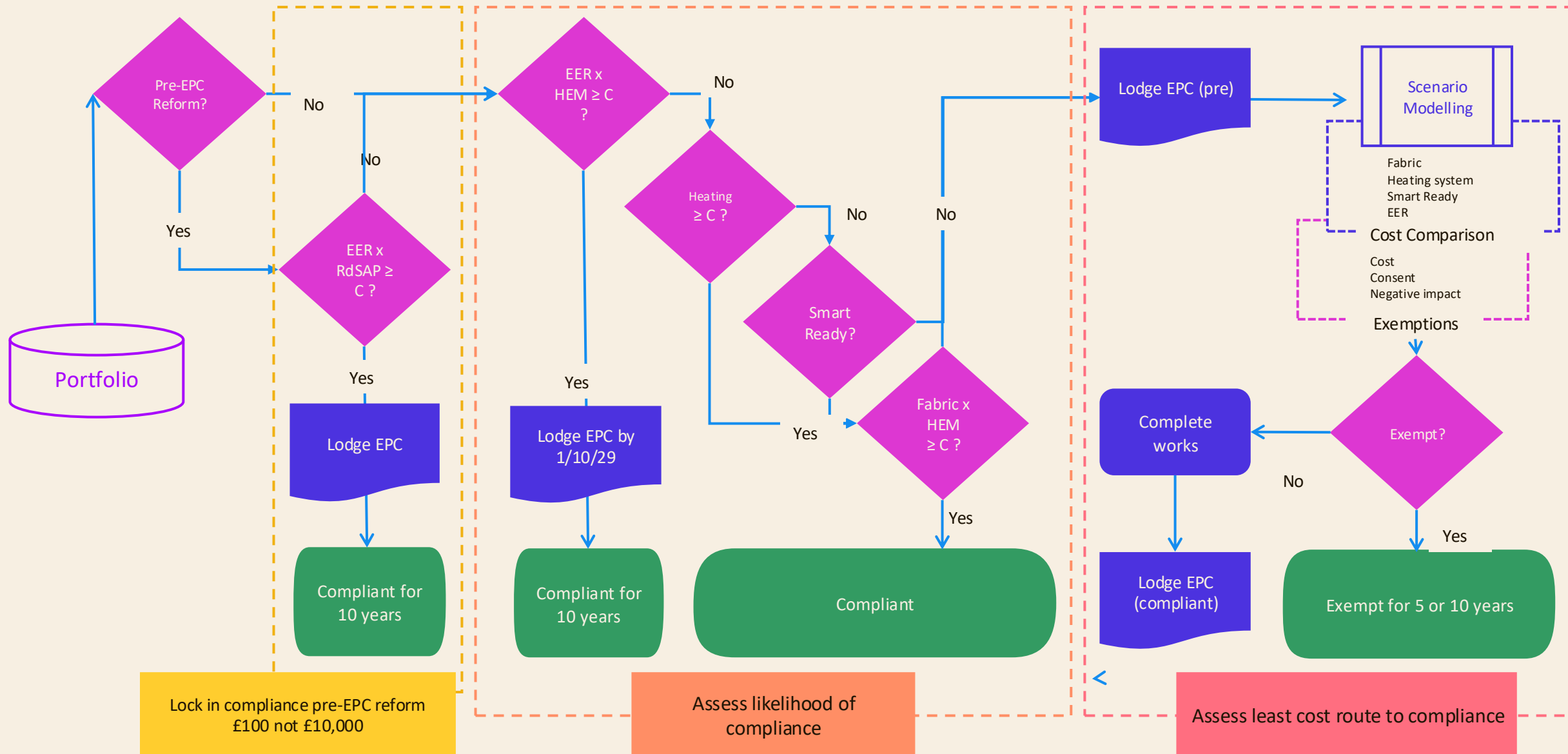
EPC Reform considers FEES may be more appropriate.

~80% parity between EER C and FEES would be ~100 kWh/m²/yr (in RdSAP terms)

Logic for Private Rented Sector MEEES



Logic for Advice Provision



Data required to model least cost route to compliance

- **Inputs**

- Relevant calculation engine – RdSAP or HEM
- High resolution property data
- 2,400 measures
 - Latest market pricing
 - Include or exclude dependent on supply chain, planning, eligibility criteria etc
- Landlord input on recent changes
- All homes or focus analysis

- **Multiple objectives**

- EER
- Fabric performance
- Carbon emissions reduction
- Fuel bill reduction

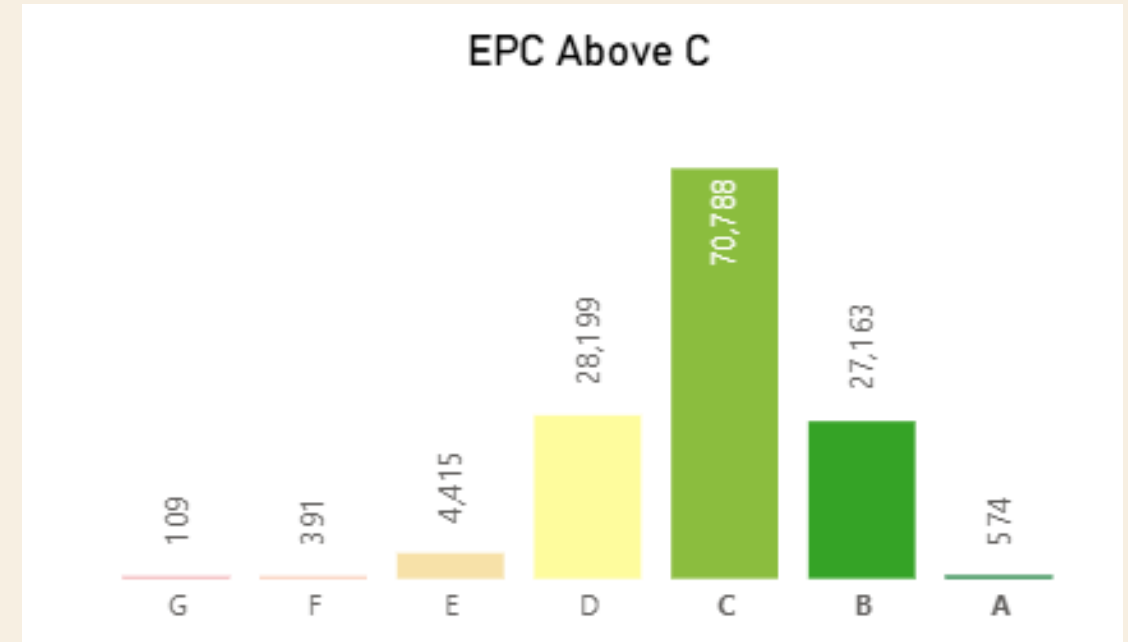


Risk Assessment

Practice

Lodged EPC

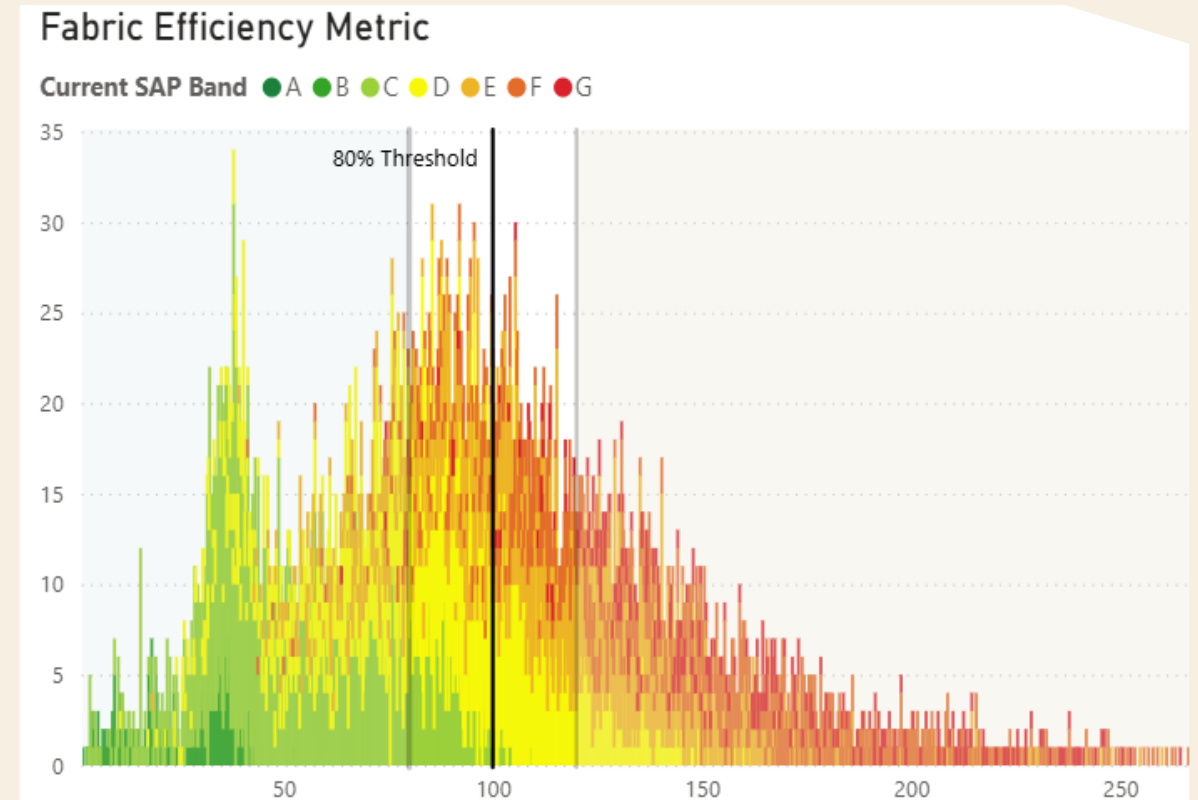
- The simplest route to meeting compliance is to find which of your properties currently meet SAP EER C and have a validity running through 2030
- There may also be some properties that you can identify that just need a renewed assessment to extend the validity
- Our tools can help identify currently lodged and valid EPC C rated properties, EPC C properties where validity will expire before 2030 and those on the cusp of a C now
- You may wish to look for properties that expire shortly after to prioritise these in later works



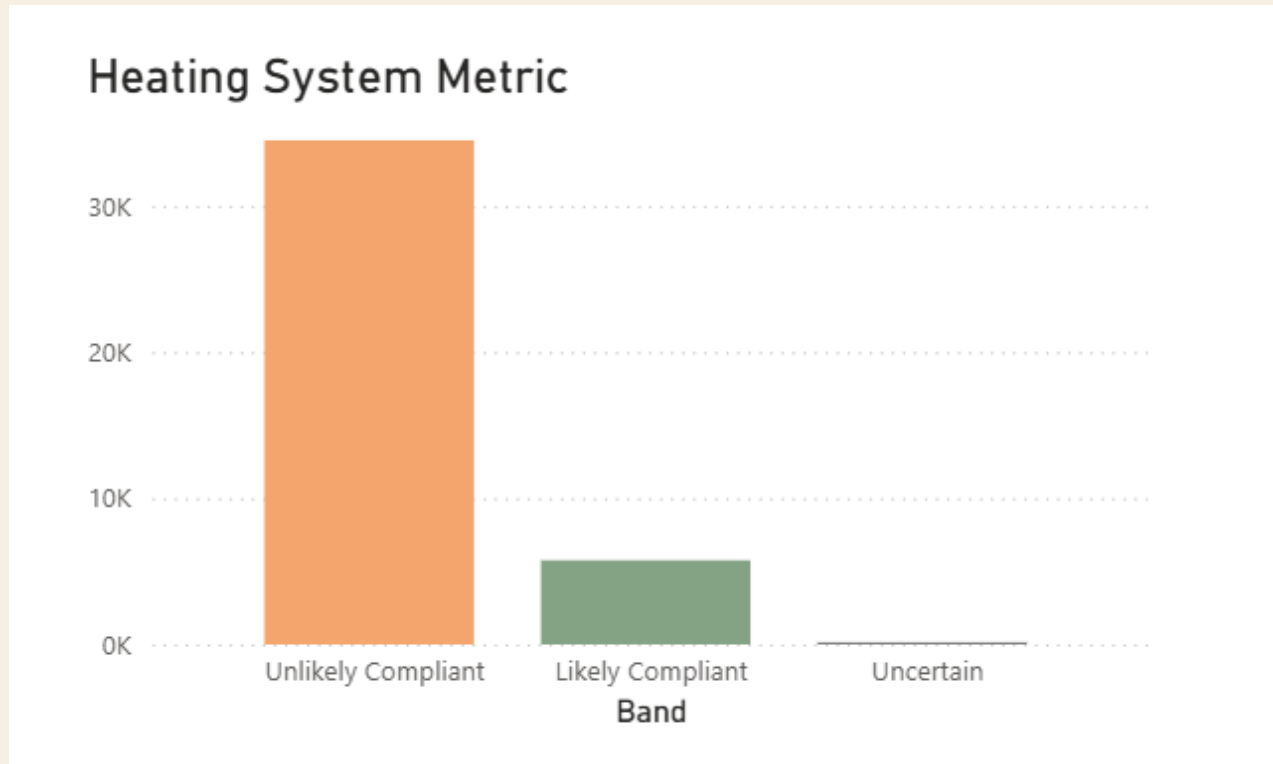
A screenshot of a "Select EPC Date Range" interface. It features a "Lodged Date" label and a dropdown arrow. Below this, there are two date input fields: "31/12/2020" and "25/03/2026". A horizontal timeline with two circular markers is positioned below the date fields.

Fabric Efficiency Metric

- Presently two potential fabric efficiency metrics
- We are modelling our Fabric Performance risk based on the latest EPC reform documentation
- This suggests a threshold for heat demand to be set as to ensure 80% of C rated homes remain compliant
- We calculate this figure to be approximately 100 kWh/m²/yr
- Our reports highlight properties that are lower, medium and higher risk



Heating System Metric

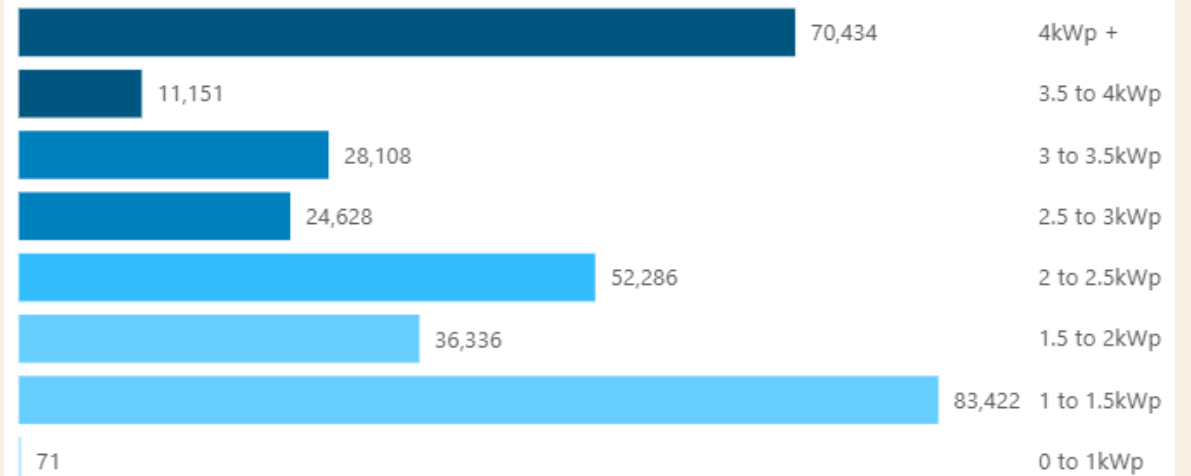


- MEES and EPC Reform documentation offers a reliable basis for assessing how most properties will align with the Heating System Metric
- Properties heated by fossil fuels are expected to fall outside compliance in the vast majority of cases
- Compliance is anticipated for heating systems that are both clean and efficient
- Within our reports, properties can be filtered by three categories: Compliant, Non-Compliant, and Uncertain with further breakdowns on system and fuel
- Once additional guidance becomes available for the uncertain systems, they will be reclassified into the relevant category

Smart Readiness Metric

- This will assess how homes can flex their energy use but is yet to be detailed
- Government has said it will provide further guidance shortly
- As it was used as the consultation proxy, we believe that a PV system is likely to meet compliance, but we are yet to know whether a battery will be required
- As further details emerge on what other technology meets compliance for Smart-Readiness we will update our risk assessment reports accordingly

No. PV arrays by peak power



MEES - A Case Study

- This property currently is C rated
- Under MEES this property will not meet Fabric, Heating or Smart Readiness
- Options:
 - Internal wall insulation meets fabric target, but will likely be cost prohibitive, can seek exemption
 - HHRSH will likely meet heating system metric
 - Listed building so PV less viable for smart readiness
 - Get a new EPC lodged to take validity through 2030 and with new data

Results	
SAP 9.94	68.20 D
SAP 10 ?	69.13 C
EI	62.52 D
Overheating Risk	17.36°C (minimal)

Using regional weather	
Fuel Bill	£847
Realistic Fuel Bill	£1,496
Heating Cost	£769
kWh/m ² Heat Demand	120.18

Known lodged scores	
SAP	67 D (06/03/17)

Property Summary

Age:	A: pre-1919	Glazing:	100% Double glazing 2002 or later
Property Type:	Flat: End Terrace: Top Floor	Heating:	Boiler: A rated Combi
Tenure:	Owner-occupied	Main Fuel:	Gas: Mains Gas
Walls:	Sandstone: AsBuilt	Hot Water:	From main heating system: Mains Gas
Roof:	PitchedNormalLoftAccess: 270mm	Renewables:	None

Compliance Check

- We'll update KPIs as policy is confirmed
- View which homes are compliant or at risk of non-compliance, at a glance
- Create address groups for different advice pathways
- Encouraging action now or plan for future

Address	Postcode	Confidence	Known Lodged EPC		Calculated Results	
			SAP	Lodged Date	SAP 10	kWh/m ² Heat Demand
44, Mill Green London Road, HASTINGS	TN34 1BP	8.9	75 C	11/12/2018	72.77 C	82.8
3 CITY PARK, ST. LEONARDS-ON-SEA	TN38 9EG	7.7	55 D	03/12/2020	53.73 E	48.8
FLAT 15 , ST. LEONARDS-ON-SEA	TN38 0YX	8.6	76 C	15/12/2020	69.48 C	43.7
FLAT 16 , ST. LEONARDS-ON-SEA	TN37 6AG	8.8	76 C	01/05/2017	70.79 C	49.3
31 CITY PARK, ST. LEONARDS-ON-SEA	TN38 9HB	8.6	66 D	15/02/2019	61.38 D	76.3
FLAT 24 , HASTINGS	TN34 2BB	7.6	67 D	03/07/2021	70.66 C	45.9

Heat demand figures suggest all will pass new fabric performance

At risk of non-compliance, advise now on options

EPC invalid by 2030, worth refreshing now

Appears non-compliant but may comply under RdSAP 10

Compliance Pathway

- Model from a library of 2000+ measures
- See what measures are most appropriate for properties as opposed to EPC recommendations
- Model across all incoming EPC Reform Metrics

	Name	Cost	Cumulative	SAP 10 Score		kWh/m ² Heat Demand	
				Current	Lab	Current	Lab
↓ ↑	Programmable TRVs	£673.00	£673.00	59.33 D	61.65 D	114.4	104.6
↓ ↑	300mm loft insulation from unknown insulation - access to loft	£1,822.00	£2,495.00	59.33 D	62.35 D	114.4	101.6
↓ ↑	Draughtproof doors and windows	£326.00	£2,821.00	59.33 D	62.72 D	114.4	99.2
↓ ↑	3kWp PV array south and 30 degree pitch with no shading	£6,707.00	£9,528.00	59.33 D	74.26 C	114.4	99.2
↓ ↑	High heat retention storage heaters and dual immersion cylinder from G rated gas boiler	£8,436.00	£17,964.00	59.33 D	68.61 C	114.4	108.0
		£17,964.00					

£4-7k to meet smart readiness*

£2,800 to get to fabric target

£8k to get to meet heating target

04



One Stop Shop

Available now

No cost, no procurement

Barriers to Action

How Cotality overcomes complexity and addresses confusion with a One Stop Shop



Unclear compliance & outdated EPCs →

Bulk analysis + latest EPC modelling



Biased / unclear advice →

Independent, survey-led recommendations



Portfolio complexity →

Scalable analysis + tailored plans



Quality & regulatory risk →

PAS 2035-aligned QA + retrofit coordination



Installer trust gap →

Vetted national installer network



Cost concerns →

Low-cost entry + least-cost retrofit pathways



Funding confusion →

Integrated funding checks and prompts

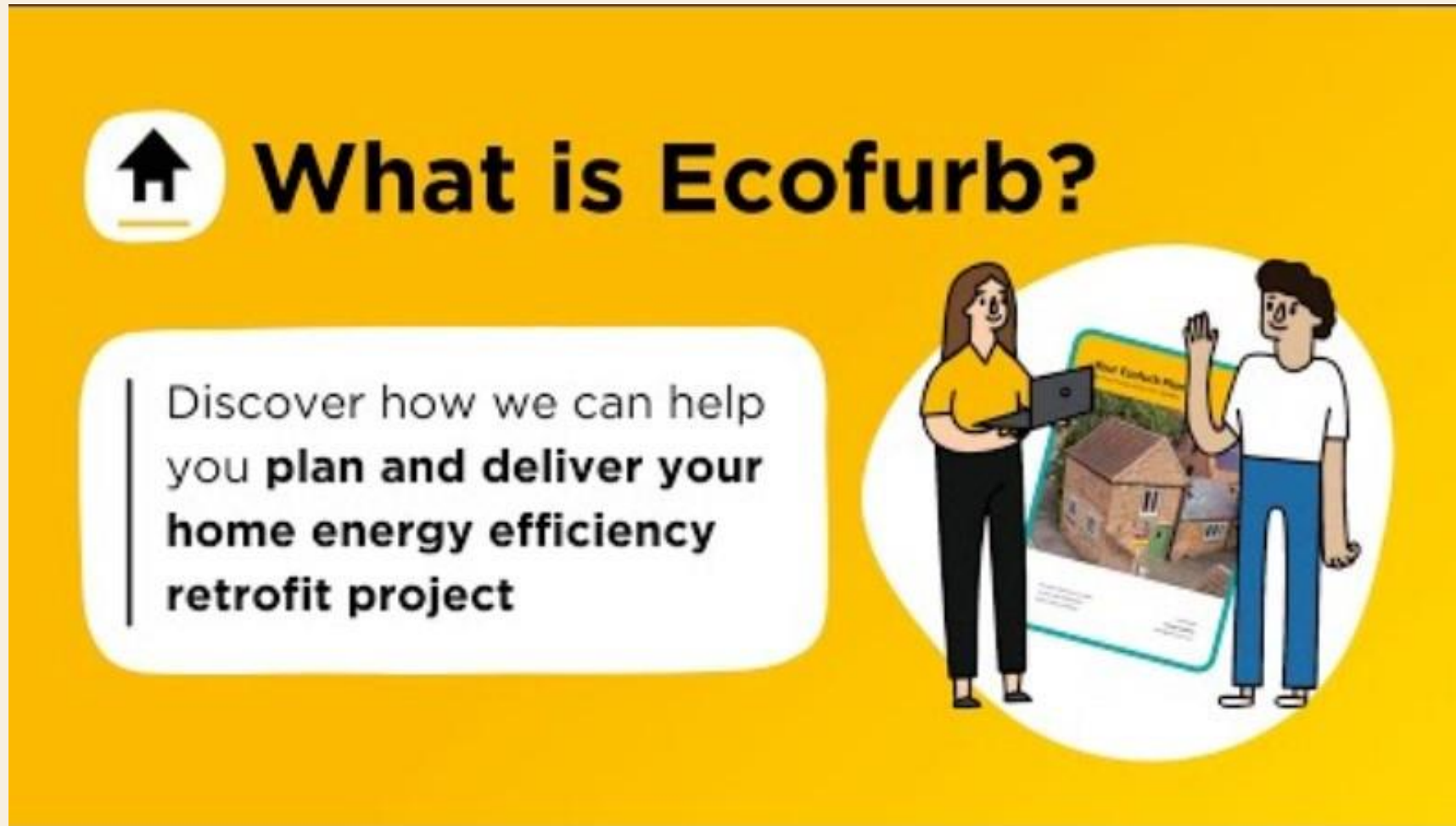


Low confidence →

Audit trail + oversight + follow-up


Overview...

Started in London end of 2019 – now Mainland Great Britain, with new Landlord offering for 2026



What is Ecofurb?

Discover how we can help you **plan and deliver your home energy efficiency retrofit project**



What is a one stop shop?

A one stop shop needs to support customers from initial consideration to installation, with advice and quality assurance independent of installers to ensure the service is tailored to the home(s).

Vitality it combines independent advice with a seamless journey

- A **free, online advisory platform** offering expert guidance tailored to the home
- **Tailored survey-driven plans** designed specifically for landlords and homeowners
- **Property-specific expert advice**, aligned with budgets and aspirations... and **MEES**
- **Finance options**, including relevant grants and finance partners or independent advice.
- Direct access to **trusted installers**, ensuring quality and reliability
- **Independent retrofit coordination** for more complex installations
- **Data and document capture** for record-keeping and reporting
- **Single, low risk measures route** – straight to installation



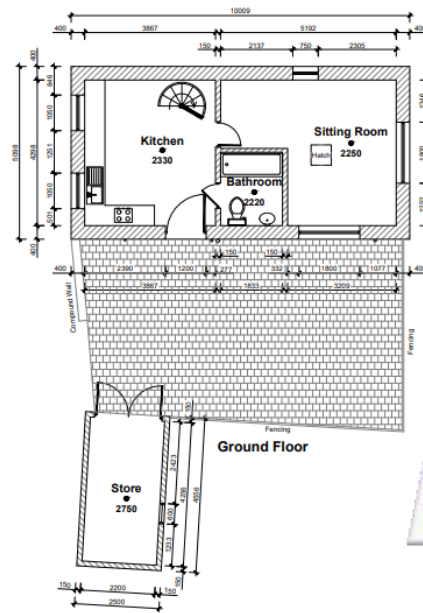
IECOFURB
The Low Carbon Home Service

Expert advice



- PAS2035 ready (and more)
- Grant eligibility check
- Ecofurb Plan options for homeowners & landlords

Floorplans



Phase 2 Measures: Fabric First measures	Estimated Costs	Energy Rating	Fuel Bill	tCO ₂
After Phase 1	Per Measure	62 D	£1,230	5.89
Upgrade Room-in-Roof - insulate throughout	£7,450	63 D	£1,230	5.86
Insulated floors (50mm) from 1900-1929 suspended timber floor	£7,950	64 D	£1,180	5.58
One Part L insulated door (all doors)	£1,500	64 D	£1,180	5.56
A+ rated double glazed sash windows from mostly single glazing	£29,450	68 D	£1,050	4.81
Humidity controlled extractors per wetroom	£750	68 D	£1,050	4.81
Humidity controlled kitchen extractor	£750	68 D	£1,050	4.81
Internal insulation to 1900-1929 solid walls	£22,940	77 C	£750	2.99
After Phase 2 Measures		77 C	£750	2.99
Package Cost & % Improvements	£70,790		39%	49%
Cumulative Cost & % Improvements	£71,520		43%	51%



How Ecofurb supports Landlords...

Meet MEES | Minimise Tenant Hassle | End-to-End, Independent Support

CHECK: Data-led Triage



Fast, desk-based review
Single home or Portfolio

Assess likelihood of MEES compliance,
potential work required and
recommended next step

Grant check

ADVICE: In-Home Surveys



Option A: EPC Plus MEES

- Simple homes and modern builds
- Get a valid EPC
- Least cost route to MEES

Option B: Ecofurb Plan

- Older homes and complex projects
- Damp and mould
- 360° Matterport, elevations and floorplans



INSTALL: Retrofit Delivery

Transition plans to action

Vetted, quality-assured and
independent installer network

Full project oversight and
independent retrofit coordination



Ecofurb for Landlords Case Study – From D to C

Meet Joe, Local Landlord, Ground-floor Maisonette

Goal: To reach EPC C rating & avoid lengthy void period while



THE PROPERTY

- Property was rated D
- Majority single glazed windows
- Mid terraced
- Draughty old front door
- Constraints for Solid Wall Insulation

INSTALLATION

- Air Source Heat Pump Installed
- Ventilation
- High performance double glazing throughout
- High performance front door
- Full LED lighting throughout

THE RESULT

- Quick mobilisation through Ecofurb
- Local resident ready for healthy, warm home
- Post lodged EPC to lock in MEES Compliance



Ecofurb for Landlords Case Study

Meet: Helene – Landlord, Retrofit Professional, and Climate-Conscious Homeowner.

Goal: Conscious of MEES & wanting a longer-term retrofit roadmap



THE PROPERTY

- Victorian ground-floor flat
- Cold leaky & limited options
- Damp

INSTALLATION

- Phased approach, implementing phase 1 to reach EPC C

THE RESULT

- After Ecofurb referred Helene to **Knight Frank Finance**, Helene discovered she could access **preferential mortgage rates** by improving her EPC rating.
- Doing that first phase of work could actually unlock better interest rates on further lending.

Phase 1: Low-cost, low-disruption improvements	<ul style="list-style-type: none">• Programmable thermostatic radiator valves (TRVs)• Continuous mechanical extraction for ventilation
Phase 2: Fabric-first insulation upgrades	<ul style="list-style-type: none">• A combination of internal and external wall insulation (due to constraints with the upstairs flat) and treatment of localised damp issue• Underfloor insulation• Roof insulation for the kitchen extension
Phase 3: Heating system decarbonisation	<ul style="list-style-type: none">• Installation of an air source heat pump



Part of why we haven't done this sooner is not feeling confident with finding the right suppliers to do the work

Richmond Partnership Case Study

Richmond Smarter Homes Hub

Welcome to Richmond's Smarter Homes Hub

Welcome to the Smarter Homes Hub, your trusted resource for making retrofit improvements to your home that can add value, enhance comfort and reduce energy costs.

This Hub guides you through the steps to creating a smarter, healthier home. You will find information about the latest technologies and best practice guidance - tailored for residents living in Richmond upon Thames.

Email

Your email will be used to contact you about project updates. You can unsubscribe at any point. Please read our [privacy policy](#).

[About the project](#) [The team](#)

- Active**
Ecofurb - tailored energy advice
Get a free snapshot of your home's energy saving potential
[Find out more](#)
- Active**
Savings and grants
Support to save you money
[Find out more](#)
- Active**
Ventilation and indoor air quality
How to make your home healthier for everyone
[Find out more](#)

Contact Us: hello@ecofurb.com 0330 223 4351 [f](#) [in](#) [@](#)

ECO FURB | **RICHMOND BRANCH OF RICHMOND UPON THAMES**

[Home](#) [Discover](#) [Plan](#) [Deliver](#) [Contact](#)

Expert Energy Efficiency Advice for Richmond Residents

The path to an energy-efficient home doesn't need to be stressful. Ecofurb's eco renovation experts can help you at every step of your journey – from research, to advice, to all done.

- ➔ **Discover:** Free online snapshot of your home's energy saving potential and upgrade costs
- ➔ **Plan:** A tailored, step-by-step retrofit plan for your whole home, from our expert Retrofit Coordinators
- ➔ **Deliver:** Trusted installers with independent quality-assurance checks from our dedicated team

Discover your home's energy saving potential

Smarter Homes Hub x **ECO FURB**
The Low Carbon Home Service

[Richmond Ecofurb microsite](#)
[Richmond Smarter Homes Hub](#)

Partnership experience with Local Authorities



Local Authorities or Gov Schemes

1. Camden Council – heavily subsidised 20 Ecofurb Plans + Camden Climate Fund
2. Hammersmith & Fulham – 100 fully subsidised Ecofurb Plans (majority flats!)
3. Green Homes Wales – fully funded Ecofurb Plans and Retrofit Coordination + interest free loans and small grant contributions

Funding utilised

1. Carbon Offset Funding
2. Budget from Public Health related ‘pots of money’ – as retrofit improves residents health and wellbeing does too
3. Participatory Budgeting – local citizens panel given funding and allocated it to retrofit
4. Funds from Section 106 (can be more difficult than carbon offset funding)
5. Climate Response or Climate Action Budgets

Engagement Activities

- Door knocking ‘Boots on the ground’ engagement with local community groups
- Use existing grant touchpoints (e.g. energy cafés, libraries) to refer non-eligible households into Ecofurb for finance-backed or self-pay retrofit
- LA sponsored Webinars

Engagement Activities

- Using Pathways data, Ecofurb helped target householders via a Council campaign mailout
- Ecofurb's marketing team provided content/messaging suitable for resident's profiles for Council's e-bulletin / newsletter / social media
- ‘Piggyback’ other grant funded projects – to utilise promotion routes and add on able to pay offer

Summary

Key take aways

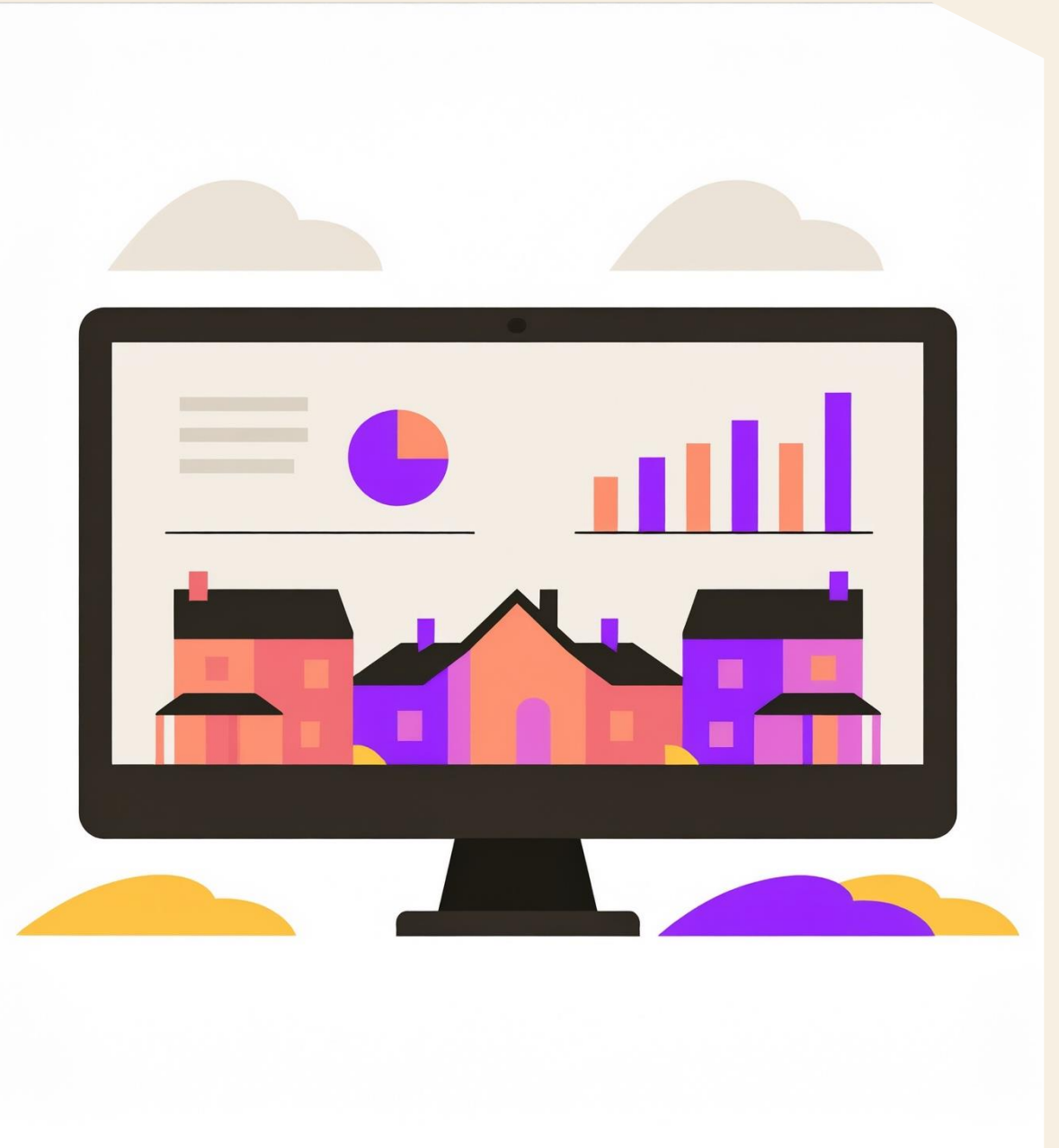
There is uncertainty - but many landlords could benefit from advice now to comply under RdSAP.

Data is key – more confidence, more responsive.

As is logic – how will exemptions be proven.

Existing clients: new reports this week and modelling available now.

Interested? Book a discovery meeting.



Questions?

Contact us for

- Further questions and feedback
- Clients User Group
- EPC, RA and EPR services
- EPC data services
- Retrofit Intelligence
 - Portfolio
 - Pathways
 - Surveyor Pro
- One Stop Shop

Liz Lainé
llaine@cotality.com

Russell Smith
rusmith@cotality.com



Thank you

