



Let Zero: One-Stop Shop Governance and Delivery for the Private Rented Sector

Research Findings November 2025

**Sheffield
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Image Credit: Ceri Batchelder, SYMCA

The Let Zero project team visiting the Advanced Manufacturing Research Centre (AMRC), Sheffield

Introduction

Let Zero is a project focused on tackling poor housing conditions in the Private Rented Sector (PRS), including damp and mould and high carbon emissions. The project aims to create a trusted pathway for property upgrades for landlords and tenants, through establishing a one-stop shop (OSS) service that will support local authorities to address fuel poverty in PRS households, which make up 19% of the housing sector in the UK. The project is funded by Innovate UK and led by SYMCA.

As a project partner, the Centre for Regional Economic and Social Research (CRESR), Sheffield Hallam University, has conducted research that embeds real-world knowledge and practice in the design and delivery of the Let Zero OSS by providing research insights relating to the governance of PRS retrofit in South Yorkshire. Our research:

Explores the existing landscape of retrofit OSSs in the UK and EU

- Drawing on a systematic literature review, desk-based research of 51 retrofit services, and 15 OSS interviews, we identified specific lessons for a PRS OSS in South Yorkshire.

Draws on the lived experiences of landlords and tenants

- Through interviews with ten landlords and seven tenants exploring important barriers, enablers and considerations for delivering retrofit in the PRS.

Reflects on the experiences of developing a retrofit OSS for the PRS in South Yorkshire

- Through interviews with 13 Let Zero project partners and 11 regional stakeholders to foreground key learnings from the process of bringing project partners together to create a retrofit OSS.

The Team



Project lead



Project management



Energy social enterprise



Sustenic - Data analysis



Decarbonisation and sustainability charity



Heat pump design and installation



Retrofit Delivery/Internal Wall Insulation



External Wall Insulation



AI-generated retrofit design



Centre for Regional Economic and Social Research

Governance, Business Models & Tenant, Landlord Engagement Research



Heating supplier



Supporting offsite manufacture innovation

Our research questions

The overarching aim of the research is to investigate:

How can a One-Stop Shop (OSS) for housing retrofit in the PRS be designed and implemented to inform a just and sustainable transition in South Yorkshire, embedding the lived realities of local actors across the retrofit ecosystem?

We have done this through addressing three research questions:

- 1) What is the current landscape of retrofit OSSs in the UK and Europe, and how can their shared experiences inform the development of a OSS for the PRS in South Yorkshire?
- 2) How do landlords and tenants perceive retrofit and the role of OSSs, and how can this inform the design of a OSS for the PRS?
- 3) How has the Let Zero OSS pilot mediated the governance and delivery of retrofit in South Yorkshire, and what lessons can be learnt to inform a scalable and regionally appropriate approach?

This report summarises our key findings and highlights recommendations for the future development of the Let Zero OSS and retrofit policy in South Yorkshire. Learnings highlighted throughout the report are applicable to the future delivery of the Let Zero OSS service, to those involved in scoping new retrofit OSS projects, and to those developing grant proposals for similar scale retrofit delivery projects.



Image Credit: Ceri Batchelder, SYMCA

The Let Zero project team visiting different PRS residences in Sheffield. The building in the image is Park Hill Flats - a Grade II listed building dated 1957-1961. This is a mixed-tenure residency.



THE GOVERNANCE OF RETROFIT ONE-STOP SHOPS: THE LANDSCAPE

The governance of retrofit one-stop shops: the current landscape

Methods:

- Semi-systematic literature review that identified the 25 most relevant peer reviewed sources and eight grey literature sources.
- Desk-based research of 51 retrofit delivery services and one-stop shops in Europe and UK.
- 15 Semi-structured interviews with retrofit delivery services and one-stop shops in Europe and UK.

Overarching findings:

- Retrofit OSSs aim to offer independent and impartial advice about domestic retrofit, including technical measures and financing options. Proponents for OSSs see this as a way of generating demand, allowing the supply chain to invest in training and accreditation; overcoming poor quality work and building trust between customers and the supply chain; and simplifying the customer journey to minimise drop out.
- Most existing OSSs follow a coordination model, in which advice is given and market players are coordinated, but the contracting of works is left to the homeowner.
- Key challenges for OSSs are the increased costs associated with coordinating services and suppliers, known as *transaction costs*, and the risk and costs of contracting work or making referrals.
- Few OSSs exist that directly target landlords and the PRS.
- The most successful OSSs have clear aims and values, which are used to align stakeholders and services offered. This enables good governance.
- Strong customer management systems are important as the customer journey (from advice to installation) can be several years long.

Retrofit One-Stop Shop approaches

We found that while a range of approaches to delivering retrofit OSSs exist for able-to-pay homeowner markets, the majority offer advice, coordination, and quality assurance services rather than direct installations. Most services interviewed (12 out of 15) followed the **coordination model** (see image). Services typically began under the facilitation model, gradually expanding their service.

Offering **impartial advice** was where respondents reported their service as adding the most value. This built confidence in the technology and the supply chain. This was reinforced in some services by offering compliance and quality checks and supporting customers to make decisions about when to release funds.

Income streams included paid home energy efficiency surveys, retrofit design reviews, technical compliance checks, co-op membership, supplier referral commissions, charging a percentage of final costs, and grant funding. For OSSs that have reached **financial sustainability**, it took five years on average.

Overall, many respondents noted that finance and funding for households to do retrofit work was still a major barrier.

Business model	Roles & responsibilities	Practical example of what the one-stop-shop offers to homeowners
1 Facilitation model	<ul style="list-style-type: none"> • Raise awareness on energy renovation benefits • Provide general information on optimal renovation works • First advice at the 'orientation stage' 	It advises on how to renovate your house and can provide you with the list of suppliers.
2 Coordination model	<ul style="list-style-type: none"> • Coordinate existing market actors (suppliers) • Make sure all one-stop-shop services are offered to homeowners • No responsibility for the result of renovation works (only overlooking the whole process) • No responsibility for the overall customer journey (just the first part) 	It advises on how to renovate your house and will push suppliers to comply with their promises. Suppliers remain responsible for the final result.
3 All-inclusive model	<ul style="list-style-type: none"> • Offer a full renovation package to homeowners • Bear responsibility for the result of renovation works • Bear responsibility for the overall customer journey 	The one-stop-shop is a contractor that sells you the whole service package and is your main contact point in case something goes wrong with suppliers.

OSS business models, Cicmanova et al. (2020)

'Part of our oversight is making sure financial transactions happened at the right time... We don't want a customer to give up funds when something isn't complete or hasn't been done correctly because once those funds have gone, it's pretty much a one-way street.' (ID01UK)

Governance models and considerations

OSSs adopt a range of different governance and organisational structures (see table). **The governance arrangements fundamentally shape how each service is delivered**, who the key beneficiaries are, how decisions are made, and how risk is managed. It also influences income streams and supply chain relationships (e.g. co-ops offered installer memberships and LAs needing to follow procurement rules).

Regardless of organisational form, the **aims and objectives** of each OSS shaped decision-making processes, expertise and networks required for operating the service (e.g. fuel poverty focused services drew on social work and health expertise, whereas those concerned with carbon footprint were architect-led).

Organisational flexibility was required by all services to adapt to seasonal variations in demand, the changing funding environment and cash flow issues generated by the long-retrofit timescales. As such, the size of team varied between services, but the majority had **5-15 members of staff**.

Model	OSS	Combined and local authority or municipal project	Co-operative, community benefit society or community interest company	Charity	Private enterprise
Facilitation	ID06UK				
Coordination	ID14EU				
	ID12UK				
	ID15UK				
	ID03UK				
	ID01UK				
	ID04UK				
	ID05UK				
	ID08UK				
	ID07UK				
	ID02EU				
	ID10EU				
Development/All inclusive	ID11EU				
	ID09UK				
	ID13UK				

Legal and organisational OSS models within services interviewed (Witherley et al., 2025).

Working with the supply chain

Supply chain challenges are a key bottleneck in scaling the retrofit sector (PwC, 2022; Brocklehurst et al., 2022; Balagopalan & Jones, 2023). Building a **local supply chain** for retrofit is an important aim for many OSS providers. Customers **indicated higher levels of trust in local installers**, feeling that they better understand the local area and house archetypes. There was also a greater sense of **accountability** associated with being able to contact a local company rather than a national firm. OSS themselves associated local installers with **higher quality work and lower costs**, because they could visit properties multiple times to conduct surveys and pre-work, whereas those travelling longer distances would aim to minimise travelling.

Many OSSs followed **‘the spirit of PAS 2035’**, even for privately funded work, but encountered difficulty in finding accredited suppliers. This was attributed to prohibitive cost of training and high staff turnover.

However, despite building a local supply chain being a core tenet for many OSSs, **few directly appoint suppliers** because it increases their liability to the extent that the service would be financially unsustainable. Instead, supply chain development was delivered by offering training and advice; connecting suppliers to customers through supplier directories; managing quality by supporting installers to rectify poor quality work; and focusing on microbusinesses who benefit most from the OSS.

Innovative installer engagement strategies

- **On-site training:** Bringing a mobile training rig to building sites to train workers, meaning that training can be completed in a few hours rather than losing an entire day.
- **First install schemes:** Funding a first install of a heat pump to allow installers to apply for Trustmark. This is usually in the installers own house so that they can understand how it works and where points of failure might arise.

‘The advice that we got from all our lawyers - and it was a really painful experience - was that actually to recommend someone directly is not something that you have the resources to be able to do because you’ll end up potentially by proxy underwriting risk to projects.’ (ID05UK)

Customer engagement

Free initial advice on retrofit and energy efficiency is fundamental to people engaging with the OSS and beginning the customer journey. Many of these enquiries will not end in a direct sale but were understood as building trust and normalising retrofit. Customers primarily want to know **what measure to install** and **what companies are trustworthy**. **Impartiality** of advice provided to customers is essential and is important for building trust. Initial contact should be about **establishing customer goals and their capacity to retrofit** and how this aligns with the OSS goals.

Some customers require a high level of support throughout the retrofit process and having a **designated point of contact** is important to maintaining their engagement. Customer engagement can vary and lead to different end points – a robust customer management system is helpful for tracking this.

Retrofit may not be the best option for all customers. Some houses are either already too high performing or require too much work to reach their energy efficiency goals. Some homeowners have personal circumstances, such as a lack of mobility or ability to cope with disruption, which makes retrofit unsuitable for them. In some cases, existing EPC data is inaccurate, and getting a new EPC certificate might help them reach their goals without undertaking retrofit measures.

Example customer engagement strategies:

- Social media and online campaigns.
- Community workshops (topics on reducing energy bills, heat pumps explained, connect customers to installers).
- Free thermal imaging surveys to educate potential customers on home performance and generate OSS demand.
- Public technology demonstrators for seeing retrofit in action (including mobile van or drop-ins in public buildings).
- Attending existing community events.
- Referring customers between different services (for example, Local Authority fuel poverty teams).

Some considerations for a private rented sector OSS

Defining Landlords: a person might own properties under multiple entities: e.g. personally, via multiple companies, or jointly with a spouse. It is not always clear whether the same person can make multiple grant applications - under each entity.

Landlords with properties spanning multiple local and combined authorities may face inconsistent procedural requirements: does a regional OSS simplify the customer journey or add complexity?

Management Information System (MIS) for Landlord Engagement: Robust data management is essential for managing retrofit and can help to identify engagement barriers amongst landlords.

Lack of Landlord Engagement: absent landlords and weak enforcement of existing minimum energy efficiency standards limits PRS retrofit demand.

Landlord Choice: some landlords have their own trusted suppliers. This has implications for managing relationships between the OSS and suppliers.

Housing Quality in the PRS: housing quality in the PRS can be poor, with dangerous conditions and overcrowding. Retrofit is only one priority amongst many for Local Authorities and landlords.

Landlord Motivations Vary: accidental landlords may act on values like good housing, and large portfolio owners on financial outcomes. A OSS will have to bridge this wide customer base in its offer and marketing.

Whole House Retrofit vs. Step-by-Step Approach: some landlords may prefer quick, MEES-targeted upgrades over full whole house retrofit.

Timelines and Preparation for Retrofit Work: void periods offer the opportunity to do retrofit work, but this needs to align with grant funding availability.

Total Cost of Occupancy: Retrofit savings could lower overall occupancy costs, offering a marketing angle with estate agents for energy efficiency gains.

Key policy implications and recommendations

Drawing on the research interview findings, we summarise three ways the Let Zero OSS can add value to landlords to help overcome barriers to PRS retrofit:

- 1. Offering free impartial advice** is an important element of the customer journey that can generate demand and build trust amongst landlords.
- 2. Presenting information in a way that supports decision-making** such as simple, visual reports & house walk-throughs can enable landlords to make good decisions that improve tenant quality of life in cost-effective ways.
- 3. Offering quality assurance and technical compliance** of works, including advising landlords about the quality of work conducted and when to release funds.

Initial findings show governance and business models of OSSs have important implications for customer service offer and supply chain engagement. Three questions to consider are:

- 1. What are the primary aims and objectives of the service?** This is important for determining the board membership expertise needed, job roles and for guiding decision-making.
- 2. What is the pathway to financial sustainability?** A OSS must add *significant* value to the landlord and the supply chain by making retrofit easier to navigate, not harder.
- 3. How can business models, governance arrangements and legal status best support the retrofit service's goals and delivery?** Good alignment is essential for fulfilling the OSS's mission.



PRIVATE RENTED SECTOR RETROFIT: LANDLORD AND TENANT PERSPECTIVES

Landlord perspectives

Methods and respondents:

- The findings are based on 10 x semi-structured interviews with private landlords.
- Respondents included those with larger portfolios (c.20 homes) and those with single properties and 'accidental landlords' (Landlord 5).
- Interviewees were generally serving lower value markets, mainly at Local Housing Allowance rates, across South Yorkshire and Nottinghamshire.
- Landlords presented significant differences in their financial positions, with some declaring themselves in fuel poverty, and others clearly generating sufficient surplus to invest in property improvements.

Overarching findings:

- Landlords have varying motivations for improving the energy efficiency of their properties: to enhance tenant's quality of life and to address broader environmental concerns, but the predominant reason is to meet regulatory requirements.
- Small landlords may have limited financial capacity. Whilst financial products such as low/no interest loans will help some, others are daunted by the task of meeting new requirements and may exit the market.
- There are major barriers to retrofit for landlords, related to property characteristics, planning and regulation, funding and finance, and deficits in knowledge and relationships.
- There is a cohort of 'DIY landlords' who prioritise work and carry out it out themselves. These landlords may display resistance to advice on the best retrofitting options and working with preferred/accredited contractors.
- When presented with the value propositions of an OSS, landlords identified design advice, trusted trader schemes and support on access to grants, as the main services of value.

Landlords' financial capacity and approach to improvement work

Landlords' approach to improvement work

Individual landlords are undertaking extensive energy improvements; interviewees described installing internal, external and cavity wall insulation and renewable energy technologies. However, most interviewees had carried out **limited improvements to windows and doors and heating systems**.

Varied motivations are at play, with some landlords driven by a desire to improve tenant's quality of life, others by environmental concerns. However, **regulatory compliance seems the dominant motivation**.

A significant cohort of landlords undertake **improvement work themselves**. Interviewees preferred doing this when their property was empty. This may create challenges in workflows for any new OSS/suppliers.

Tenants were not pushing landlords for whole house retrofits, but rather **smaller interventions**. For example, on damp and mould, landlords were installing PIV units as an easy fix, **rather than addressing underlying causes**.

Landlords' financial capacity

- Some landlords were paying for energy efficiency improvements through surplus profits, undertaking work in a planned fashion, justified by future rental values.
- Others however were grappling with financial difficulties and delaying key improvements, noting that '*we are in fuel poverty*', and becoming indebted to energy companies themselves. This reflects landlords varying circumstances – for some, rents provide a modest, primary income, for others their properties are their pension provision.
- The trade-offs from new regulations (e.g. MEES) may be profound, creating additional costs, which will feed through to increased rents.
- Without access to cheap sources of finance or funding, energy improvements will likely not be pursued.

'My attitude [is]... I'm in control... not saying to a contractor do what you want... that's an anathema to me.' (Landlord)

Landlords' perceived barriers to energy improvement work

Property characteristics

- Landlords believe moving from an EPC D/E to a C is not feasible/financially viable for specific reasons (e.g. structural characteristics of the property).
- Flats raise specific challenges e.g. assessments making requirements that are not viable, such as solar panels.
- Landlords perceive internal insulation as too difficult/messy.

Regulation/planning

- Uncertainties around MEES are affecting landlord plans and investment decisions. It is making some consider exiting the sector.
- Landlords in conservation areas are struggling with planning permissions (e.g. to upgrade windows). They see this process as too time consuming and therefore not worth pursuing.

Financial challenges

- Retrofit advisors are proposing costly solutions, without finance options.
- Past grant programmes are seen as *'not well designed or executed'* (Landlord 7), meaning landlords opting not to engage with current programmes.
- Landlords are sceptical about applying for grants as they see them as unlikely to succeed.

Knowledge/relationships

- Landlords are worried about selecting the wrong technologies - *'solar has been kicked about and it seems a mixed bag'* (Landlord 7), recognising gaps in their own knowledge and a need for trusted advice.
- There is a lack of trust in suppliers, e.g. landlords recounted negative experiences with a retrofit company, who inflated quotes for Thermostatic Radiator Valve (TRV) replacements.

Landlords' view on the OSS value proposition

1) Specialist advice on retrofit design

- Some landlords want an efficient design service that removes onus on landlords to tell them what changes will be most effective – a portal where they can ask, *'what can I do with my building?'* (Landlord 3).

2) Access to grants and finance

- Demand for a service which helps them understand and navigate funding and finance options. Landlords bemoaned complexities in grant programmes, saying *'sometimes you don't know what's about and it's too complicated'* (Landlord 5). *'Putting the links in my hand so I can just click OK'* (Landlord 9).
- Landlords desire a whole-service function, i.e. which handles all the full grant application and administration.

3) Assuring quality and suitable contractors

- Access to trusted and established contractors is important, *'getting reputable companies [who understand] new ways/products... don't want someone who's just set up... not getting caught out... wanting the right people'* (Landlord 7).
- Others added caveats and wanted help *'getting quotes... [but] only if cheaper... it all comes down to costs'* (Landlord 4).
- If a trusted supplier scheme is introduced, landlords want the OSS to be accountable for their work and for low quality workmanship.
- A cohort of landlords are sceptical about a trusted supplier scheme because they already have their trusted networks. For this group, a full-service offer will be difficult to sell.

Key implications & recommendations for the OSS

Getting the right financial model for the OSS

- Some participants clearly have the resources to pay for the OSS on a fee structured basis. For others this will put people off, so costs may need to be capitalised into works.
- There is a significant gap in affordable finance which will affect demand for the OSS. How can stakeholders address this?

Flexibility in OSS services

- The interviews reveal the key OSS services that landlords value (tailored design, grants & quality assurance) vary by landlord types (small, large, accidental) - tailoring offers will be crucial.
- Each service may require a different charging system, or the design of a flexible charging system, so some users are able to opt out of certain services.

Understanding motivations

- The desire to meet new regulatory requirements was a prevalent driver for landlords.
- Changes in regulations offer an opportunity to drive demand for services, where these provide efficient and cost-effective solutions.

Providing a whole (joined-up) service offer

- Interviewees with experience of retrofit advisors noted missing elements of support (e.g. where technical advice was not accompanied by sufficient support on funding or finance options). Others demanded quality guarantees for contractor's work.
- Expectations of what the OSS provides need to be managed (e.g. supporting decision-making and facilitating grant applications, rather than providing new finance). Unclear boundaries risk the service being perceived as fragmented.

Tenant perspectives

Methods and respondents:

- The findings are based on seven semi-structured interviews with private sector tenants in South Yorkshire.
- Respondents included those in properties with modern heating and insulation systems, but also some in older, less energy efficient homes.
- Interviewees were generally living in lower value properties, and on lower incomes.
- Interviewees reflected a range of relationships with landlords, with some being in direct contact about repairs/improvements and others dealing with management companies/letting agents.

Overarching findings:

- Interviewees highlighted various property issues, predominantly relating to damp and mould, draughts and ill-fitting doors and windows.
- They reported multiple barriers to improving energy performance, with some highlighting specific property characteristics as the main barrier, and others stressing their lack of influence with the landlord.
- There are specific worries about having to move out of the property, and who would pay the moving and accommodation costs.
- Respondents would value a OSS advising them on their tenancy rights and move-out processes/costs. Others highlighted how a OSS might broker discussions between landlords and tenants to find suitable solutions, potentially offering guarantees and/or support to tenants if they were negatively affected.
- Interviewees described the potential consequences of property improvements. These relate to improved quality of life, length of stay in the property, and what they would be willing to pay. Improvements may bring down bills but there were worries this may be offset by higher rents.

Tenants' perceived barriers to energy improvement work

Limited influence with the landlord

- Tenants were unsure of where they stood legally and lacked confidence to ask for changes.
- Often, previous repair requests had been ignored or only addressed when significant damage occurred or worsened.
- Tenants expected minimal action beyond basic repairs.

Fear of financial consequences

- Fear that raising issues would lead to increases in rent, eviction or sale of the property, especially in the context of the cost-of-living crisis. *'Everything is so expensive already'* (Tenant 4).
- Benefits (e.g. lower energy bills) were uncertain or difficult to quantify. *'How is it going to make my life better?'* (Tenant 5).

Concerns about disruption

- Tenants were concerned about the potential level of disruption that retrofit work might cause (needing to move out, loss of cooking facilities, pets needing accommodation, needing time off work).
- Lack of trust in landlords/contractors to stick to timelines, provide notice or carry out high-quality work.
- Tenants would want assurances of alternative accommodation (like-for-like, accessible, safe) and who would pay for it.

Communication barriers

- Some tenants reported slow or unresponsive letting agents.
- Fragmented communication channels for reporting issues to landlords/letting agents: app-based systems with no person to speak to – reduced willingness to request improvements.
- Many had never sought advice or support from external agencies or were unsure who to approach if they needed it.

Tenants' views on the OSS value proposition

1) Provision of rights-based guidance

- Tenants wanted clear and accessible guidance on tenants' rights, minimum standards, and what landlords are legally obliged to do. Tenants wanted assurance that seeking advice or starting conversations would not jeopardise their tenancy.
- The inclusion of scripts or templates to help tenants start conversations about retrofit with landlords was desirable.
- Potential for mediation-style tools, such as recommended next steps or the option to invite landlords into the OSS (to help both sides understand the benefits of retrofit).

2) Practical information on retrofit

- Tenants wanted to see verified information on relevant grants and funding they or their landlords could access for retrofit work.
- Calculations on predicted bill savings for different types of retrofit activity would be helpful.
- Information and contacts for approved contractors.

3) Accessibility and usability of the OSS

- Multiple formats for the OSS were preferred, e.g. app, website, with the option to speak to a person if needed.
- Tenants saw the importance of the OSS being known and reputable – e.g. clear branding and backed by trusted institutions. *'Important to know it's legitimate'* (Tenant 4).
- Support for tenants with different digital skills and simple designs and accessibility.



DEVELOPING A ONE-STOP SHOP: PROJECT PARTNER AND STAKEHOLDER PERSPECTIVES

Developing a OSS: Project partner and stakeholder perspectives

Methods:

- Thirteen semi-structured interviews with project partners reflecting on their experience of being members of the Let Zero consortia, and the process of coming together to develop the retrofit OSS and show home.
- Eleven semi-structured interviews with regional stakeholders about the role of a retrofit OSS in South Yorkshire, and their experiences with Let Zero.

Overarching findings

- Let Zero has made good progress on increasing focus on retrofit within SYMCA and the local authorities and growing a burgeoning network of retrofit practitioners.
- Through the project, partners have developed their businesses, grown networks and gained expertise in working in the PRS.
- The partnerships developed within the Let Zero project have been shaped and constrained by the bid writing process and the funder terms and conditions. There was little time to develop the consortium and understand different partner interests and markets, which limited the collaborations that were developed.
- The governance of retrofit in South Yorkshire is changing. Local authorities have played a key role in giving retrofit advice in the context of differing funder targets and priorities. SYMCA is well positioned to take strategic oversight and drive retrofit through a region-wide OSS service such as Let Zero.
- Forthcoming policies, including MEES, Renters' Rights Act and the EPC consultation, will generate additional compliance work for local authorities and increase pressures on the PRS. This presents both opportunities and challenges for Let Zero.
- There are further opportunities to develop Let Zero's value proposition in this context, developing a service model that is regarded as impartial and trusted, while being adaptable enough to respond to changing legislative and service user requirements.

Building OSS Partnerships: Relationships and connections

Strong relationships were established between some partners. This was attributed to a focus on project successes and **a lack of competitive tensions**. There were common motivations including building a portfolio at a regional scale that could be used for building relationships with other regional authorities, sharing their own expertise, and developing their businesses. This resulted in **opportunities for collaboration outside of the project** and has meant that several partners felt that they now had a wider network of expertise that they could draw on in the future.

However, there were challenges in the partner and stakeholder relationships. Effective collaboration was at times **inhibited by different working styles**; some partners worked in short sprints that did not always tie in with longer term work of other partners. Where there were dependencies between partners, differing priorities and ways of working sometimes **prevented deep collaboration** and relationships became more transactional to meet project deliverables, sometimes resulting in additional costs.

Let Zero has also built **positive partnerships in the region** with local communities, the energy hub, universities and colleges. Engaged through SYMCA's PRS Reference and Retrofit Steering Groups, Local authority officers were positive about the project and anticipated using it to **leverage local councillor support** for developing retrofit in their councils. However, they also noted the lack of 'kick back' (i.e. benefit or incentive in return) for supporting a retrofit OSS that enables private businesses access to residences. Local authority officers are key 'influencers' that can help to embed Let Zero in the region, if it is cost-effective and beneficial to them.

Connectors and Enablers: Throughout the project, the importance of 'connectors' emerged. These were people that could link workstreams, translate information and enable those doing the work 'on the ground' to step away from project administration.

A successful project management style has been to make sure that partners are co-ordinated, when every partner has got their own idea about the work they plan to do within the project. This has included 'moments where we've raised the flag to say to partners this doesn't appear to be gelling [or] coordinated very well with something another partner is doing.' (Project partner)

'We suddenly didn't need to do that work because it existed with a partner that we're working with in the project, and I want to be a good partner and so... that opportunity has gone from us within this project and that's a real shame.' (Project partner)

Building OSS Partnerships: Working together on a funded project

The ways in which partners worked together was shaped and, in some ways, constrained by the grant proposal and the funder terms and conditions.

While Innovate UK supported the development of the concept that formed the bid, there was **less time available for consolidating the consortium**, including understanding other partners' interests, products and existing markets. This led to some friction between partners and meant that some partners felt that they **had not been able to develop their own capacity** through the project when other partners already had existing expertise or capacity to deliver a piece of work.

The proposal included **a large number of deliverables**, some of which required more specific detail for partners to operationalise effectively. While in some cases, the flexibility in deliverables allowed partners to focus on priorities most relevant to them, the project's **overarching aim took time to become fully shared and translated into practical priorities across all partners**. This meant that the project took longer to establish, and in the early stages, decision-making and prioritisation were slower, with some participants noting that clearer goals and stronger accountability could have helped.

Local authorities were not part of the original bidding consortium (due to the project inception Innovation Lab process), so their existing services and data were not incorporated into the initial project design. Post-award, they became more integrated, but earlier involvement – where capacity and appetite allowed, could have helped leverage their data and expertise earlier in the project, reducing potential duplication of work, enabling earlier access to datasets, and aligning more closely with existing teams such as enforcement and regulatory services. This highlights the value of close collaboration with local authorities and the importance of alignment in future retrofit projects.

Partners noted that the culture of **adaptability and flexibility** built into the project enabled project management challenges to be overcome and highlighted the importance of **project management expertise** and **grant-writing proficiency** in securing and delivering the project.

Specific challenges:

- The audit process was administratively onerous and took time and resource away from project delivery.
- Funder rules constrained how some project costs could be allocated, e.g. construction costs. This meant partners had to develop administrative workarounds.
- It took a long time to secure a show home, and the one that became available was a large, complex building, meaning that the original budget was inappropriate and partners had to find additional resources to complete the flagship demonstrator.
- Once work on the show home had commenced, keeping staff on 'standby' while issues were resolved increased labour costs.

'Although there's been lots of good discussion about how this could come together and what the general aim and mission was for Let Zero, there wasn't an awful lot of detail underneath about how any of that was going to be achieved.' (Project Partner)

Building OSS Partnerships: Working together on a funded project

A key challenge was that the proposal **involved three distinct but interconnected strands of work**. To maximise the funding and time available, work packages were overlapping, meaning that work was delivered in parallel rather than sequentially. This meant that there was not time to capitalise on the learnings between strands of work, reflecting the time pressures that are typical of short grant-funded delivery cycles.

1) Developing the customer journey and advice dimensions of the OSS

- Partners had to coordinate on-the-ground delivery with building a coherent customer journey.
- Partners worked on longer timescales to build strategic partnerships.
- Partners in this strand of work had to manage disagreement about the strategic priorities of the project, such as whether to prioritise running a service on-the-ground, or wait for the full app integration. At times, the focus on technology overshadowed the more everyday aspects of running a good retrofit service.

2) Building the innovative digital tools to embed into the Fairer Warmth Platform

- The digital innovation in the Let Zero project, particularly AI, was a key reason that the grant was secured.
- Partners in this strand had greater interdependencies (such as data sharing and particular sequencing of work). However, the timeline of the project meant that work had to be delivered in parallel rather than sequentially. This risked wasting resource where priorities and needs changed.

3) Demonstrating technology through the show home

- Partners worked in shorter sprints with clear deliverables and had fewer dependencies across the whole project.
- Let Zero was an opportunity for business R&D rather than aimed at building long-term partnerships.
- Partners faced challenges such as being unable to begin work until the show home had been secured.

Some considerations for a private rented sector OSS

Outcomes for partners: learning about the PRS

Partners have gained experience about delivering retrofit in the PRS, both in terms of managing the complex relationships involved and developing retrofit technology to overcome challenges in the PRS. This is important for speaking credibly about PRS retrofit to landlords.

Outcomes for partners: business development

Let Zero has enabled partners to invest and grow their businesses and develop commercialisable products. For some, this has included developing a presence and projects in South Yorkshire. Their experience on Let Zero has also provided valuable insights that can contribute to writing future successful funding bids.

Outcomes for partners: networks

Let Zero has enabled new networks to develop, through which learning has been shared. For example, show home partners have had the opportunity to learn about the customer journey from the OSS partners, strengthening their businesses. Many partners stated that they now had a network of wider expertise to draw on.

Outcomes for local authorities

Local authorities are using Let Zero to advance retrofit agendas within their council, including the owner-occupied sector. More broadly, Let Zero is changing norms and expectations about what retrofit services are possible, and encouraging more positive engagement with the PRS beyond retrofit.

Outcomes for landlords

The development of the early stages of the landlord customer journey are well developed, and this is supported by the strong Let Zero brand. Landlords that are using the service are now able to begin factoring in retrofit to their business plans, demonstrating impact before measures are even installed.

Future opportunities

App deployment and testing was not possible within the time constrained funded period. Refinement and integration is scheduled post project (through the SYMCA-funded commercial feasibility phase).

Admin burden led some partners to go overbudget, discouraging future engagement with grant funding. Admin contingency funds could help.

Greater use of existing local authority expertise and data could strengthen future regional retrofit activity.

Retrofit governance in South Yorkshire

The landscape before Let Zero

The early retrofit approaches across South Yorkshire centred on local authorities as the main source of advice and information. However, the retrofit landscape was fragmented and unclear in fundamental ways:

1. Local authorities have **varied, competing priorities** such as filling empty homes, health, community energy, and fuel poverty, and their existing responsibilities relating to housing quality are largely framed through enforcement duties. Where responsibility lies for retrofit and how it should be enacted both within and between councils, is evidently complex. There was **no central approach in UK government for supporting the delivery of retrofit advice** (unlike in Scotland and our other EU case study examples).
2. National targets have been driven by government ambitions towards **heat pumps and solar PV**. This has conflicted with local authority advice to address **building fabric first**.
3. There is an **absence of standards for privately funded retrofit work**, including for the PRS. Local authorities and retrofit schemes have had to develop their own guidance within individual organisational priorities. Although many have used PAS2035 as a guiding specification, approaches have varied.

In practice, local authorities have had **limited capacity to roll out retrofit**. This has meant actual retrofit delivery is uneven and suffers in the absence of a fully co-ordinated approach. Equally, local authorities have to deal with the **shortcomings of past schemes**, low client confidence, and gaps in funding when preparatory and remedial works are needed.

*‘We want to... try and understand what the barriers are to retrofit and also do more during and aftercare work for retrofit to teach people, **especially with low carbon tech** how to be using the systems that we’ve implemented to optimise it as much as they can and get the most out of things like PV and heat pumps... like a post install educational and support programme.’ (Stakeholder)*

‘EPC Consultation will drive how you achieve EPC C - adding solar panels will help landlords meet EPC C but not really solve problems for tenants - yes they get reduced electricity bills but it’s reducing the overall heat demand of the house through fabric improvements that impacts energy bills most, plus damp and mould.’ (Project Partner)

Retrofit governance in South Yorkshire

Evolving governance of retrofit and OSS development with Let Zero

Let Zero has responded to the absence of a coherent national framework and has begun reshaping retrofit governance in South Yorkshire. **Strong relationships have been built with local authorities and community groups**, such as the Sheffield Energy Hub. This has supported the prioritisation of retrofit, with Let Zero being described as the ‘centre of gravity’ for retrofit in the region. Local authorities aim to use Let Zero to present a compelling case to councillors for developing retrofit agendas targeted at the private sector within councils, demonstrating that Let Zero has begun to **shift expectations around retrofit delivery**.

The project has experimented with **new tools to scale retrofit**. The flexible approach has enabled the project to evolve and take advantage of opportunities and partner strengths. For example, an ambitious intention of Let Zero was to develop an AI capability for retrofit. Despite not fully integrating these tools into a digital OSS platform, a **clearer understanding for how technology and fabric measures integrate in retrofit** has been established.

As retrofit governance is reconfigured in South Yorkshire, some key issues are emerging. Many stakeholders see **SYMCA as being well positioned to lead retrofit activity**, mobilising work across local authority directorates. However, a key concern was ensuring the **quality and cost-effectiveness** of the OSS. Poor quality work disproportionality burdens already under-resourced local authorities to handle complaints and remedial callouts.

The **wide-ranging aims and ambitions of the Let Zero project**, including addressing fuel poverty and health, developing technical solutions including AI, and housing decarbonisation, presents challenges for evaluating its overall strategic impact for SYMCA.

‘Let Zero has become synonymous with retrofit.’ (Project Partner)

‘It’s not enough just to install the measures and then walk away. You have to have that level of engagement pre and post project... that would help get people on board and we’d probably receive less complaints.’ (Stakeholder)

*‘[you’ve] got different departments who all want something slightly different, some want to end fuel poverty in their region, somebody wants to decarbonise the region, somebody wants to supplement the supply chain, and they’re all complementary ideas. **But what you design might look different depending on what your actual goal is going to be.**’ (Project Partner)*

Retrofit governance in South Yorkshire

Future governance of PRS retrofit in South Yorkshire

There are **three important proposals that have implications for retrofitting the PRS**: The Renters' Rights Act, the consultation for increasing MEES in rental properties, and the consultation for EPC reform. These could have profound implications for retrofitting the PRS. Our research has shown they may be key **regulatory drivers for landlords**. However, they also put increasing pressure on the sector, with some **landlords threatening to sell their properties** to the owner-occupier market (where such regulatory drivers are much weaker). In addition, this may impact homelessness and generate large amounts of **additional compliance and enforcement work within local authorities**, and it is not where this will sit amongst their existing, competing priorities such as filling empty properties.

OSSs offer value in helping potential customers **navigate this complicated regulatory, funding and technical landscape** to make good decisions. In doing so they can **build trust in the supply chain and generate demand**. However, there remains challenges about operating in **an uncertain funding landscape**. Income-based funding such as the Warm Homes Local Grant are not always appropriate in the PRS where landlords cannot control their tenants' financial circumstances, and there are gaps in funding for preparatory and remedial works involved in retrofit.

Let Zero has raised broader questions about the **role of SYMCA in improving landlords' properties**, the **responsibilities of landlords for repair and maintenance**, and the **lack of incentives for local authorities** to grant private suppliers access to properties in the region.

Minimum Energy Efficiency Standards Consultation: Proposal to increase minimum EPC rating to C for all rented properties by 2030, and of new tenancies by 2028. The consultation closed in May 2025.

EPC reform consultation: Proposal to introduce new metrics on EPCs to provide a more complete representation of building energy performance. This could change EPC ratings for buildings that have already invested in reaching MEES. The consultation closed in February 2025.

Renters' Rights Act: This includes removing Section 21 that allows no-fault evictions and allows tenants to challenge above market rents. There are concerns that this may cause landlords to exit the sector. Many of the key changes will be implemented in May 2026.

Key policy implications and recommendations

Drawing on our research with project partners and stakeholders, we have identified six recommendations for future development of the Let Zero OSS service:

- To ensure the Let Zero service is successful, there is still work to be done to educate the public about retrofit in the private rented sector. This includes helping tenants to understand both their **rights and responsibilities** within their residences, including their responsibility to report property issues.
- Digital exclusion can be a barrier for residents to engage with retrofit. A continued focus on **developing both an online and offline service** will help to increase demand and reduce complaints. Local authorities recognise that coupling pre- and post-installation advice is essential to retrofit success long-term by building customer confidence. The after-care handbook for tenants produced by Pure Leapfrog (see image) is a good example.
- Integrate the learnings from the show home, digital innovation and customer journey development to solidify the outcomes from the pilot phase of the Let Zero OSS.
- Continue to provide a service that is **grounded in lived experience** to build credibility with landlords and suppliers and grow trust in retrofit more broadly.
- **Work in greater collaboration with local authorities** to prevent duplication of existing work, ensure local authorities are not left behind, and to secure learnings from Let Zero.
- Further refine the service aims and objectives to **clarify the value proposition of the OSS**, driving engagement and retention, and ensuring the project is contributing to regional priorities.



Handbook for tenants, produced by Pure Leapfrog.

Acronyms used

CRESR – Centre for Regional Economic and Social Research, Sheffield Hallam University

EPC – Energy Performance Certificate

LHA – Local Housing Allowance

MEES – Minimum Energy Efficiency Standards

OSS – One-Stop Shop

PIV – Positive Input Ventilation

PRS – Private Rented Sector

SHU – Sheffield Hallam University

SYMCA – South Yorkshire Mayoral Combined Authority

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