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CONSORTIUM AGREEMENT

Between the Parties of the
Scale-up strategies for the Social Housing Agency (SHA)
project

THIS AGREEMENT is made on the 2021

- BETWEEN:** **From Streets to Homes Association** (Utcáról Lakásba! Egyesület, Hungary), whose registered office is at 1082., Baross utca 112., Budapest, Hungary as Leader of the Consortium FSHA, referred to as Coordinator.
- AND** **Metropolitan Research Institute** (Városkutatás Kft, Hungary), whose registered office is at 1093., Lónyay utca 34., Budapest, Hungary, hereinafter referred to as MRI.
- AND** **Municipality of Budapest** (Budapest Főváros Önkormányzat), whose registered office is at Városház tér 1052., Városház tér 9-11., Budapest, Hungary, hereinafter referred to as MB.
- AND** **Habitat for Humanity Poland** (Fundacja Habitat for Humanity Poland, Poland), whose registered office is at Ul.Mokotowska 55, 00-542, Warsaw, Poland hereinafter referred to as HfH Poland.
- AND** **Municipal Institute of Housing and Renovation of Barcelona** (Institut Municipal de l'Habitatge i Rehabilitació de Barcelona, Spain), whose registered office is at Carrer del Dr. Aiguader, 36, 08003, Barcelona, Spain, hereinafter referred to as IMHAB

(hereinafter referred to individually as a "Party" and collectively as "the Parties")

WHEREAS the Parties wish to co-operate over the 'Scale-up strategies for the Social Housing Agency (SHA)' project;

AND WHEREAS this Consortium Agreement sets out the relationship between the Parties and the organisation of the work.

1. PREAMBLE

- 1.1. Parties won the tender on „Planning the Scaling of Proven Social Service Innovations” with the „Scale-up strategies for the Social Housing Agency” project (hereinafter referred to as „SHA project” or „the Project”) called by the European Social Catalyst Fund (ESCF). The Grant Agreement on the SHA project began on 1 February 2021.
- 1.2. This Consortium Agreement applies solely to the SHA project and related operations between 1 February 2021 and 30 September 2021.
- 1.3. This Consortium Agreement covers the general operation of the Consortium. Additional details and specific requirements (including a schedule of works, budget, indicators to be achieved, dissemination activities) can be found in the Contract (Grant Agreement) between the Consortium and the ESCF and its Annexes.

2. TERMS AND CONDITIONS

- 2.1. All Parties are governed by the terms and conditions of the Grant Agreement and its annexes between ESCF and the Consortium including the clauses on the quality of delivery, intellectual property rights, the rules to choose subcontractors and the rules governing financial claims (the latter is specified in the „Use of the Grant” section).
- 2.2. Each Party undertakes to take part in the efficient implementation of the Project, and to cooperate, perform and fulfil, promptly and on time, all its obligations under the Grant Agreement and this Consortium Agreement.
- 2.3. The project will start with an online kick-off meeting to produce the detailed work plan, assessing partners’ tasks and responsibilities for the upcoming eight months. Each Party is responsible for fulfilling the tasks undertaken in the project plan on time.
- 2.4. Each Party undertakes to notify promptly, in accordance with the governance structure of the Project (outlined in the Grant Agreement), any significant information, fact, problem or delay likely to affect the Project.
- 2.5. Each Party shall promptly provide all information reasonably required by a Consortium Partner or by the Coordinator to carry out its tasks.
- 2.6. Each Party shall take reasonable measures to ensure the accuracy of any information or materials it supplies to the other Parties.
- 2.7. In the event the Coordinator identifies a breach by a Party of its obligations under this Consortium Agreement or the Grant Agreement (e.g.: a partner producing poor quality work), the Coordinator will give written notice to such Party requiring that such breach be remedied within 30 calendar days. If such breach is substantial and is not remedied within that period or is not capable of remedy, the Coordinator may decide to declare the Party to be a Defaulting Party and to decide on the consequences thereof which may include termination of its participation.
- 2.8. A Party that enters into a subcontract or otherwise involves third parties in the Project remains solely responsible for carrying out its relevant part of the Project and for such third party’s compliance with the provisions of this Consortium Agreement and of the Grant Agreement. This has to ensure that the involvement of third parties does not affect the rights and obligations of the other Parties under this Consortium Agreement and the Grant Agreement.
- 2.9. In the Grant Agreement financial and non-financial support is being provided in order that the Parties develop a plan for scaling that includes elements that will make implementation more likely to occur. Therefore, the Parties develop plans that contain the following:
 - detailed description of the innovation, including whether place-based and/or digital solutions are being planned;
 - the scope of the scaling intended, with supporting evidence of potential to succeed – i. e. where the innovation is planned to be implemented and the potential number of service users/end beneficiaries that will be targeted;

- timeframe and milestones – it is expected that the plan will seek to be implemented to a substantial level of scale within two years;
- cost and nature of current response (where this exists) to service users/end-beneficiaries;
- consultation with intended service users/end-beneficiaries;
- mechanisms for scaling and sustainability – description of how the scaling is intended to take place and how it will be sustained;
- financing arrangements - what will be the costs of scaling and who will be the funders – please provide evidence of written agreements, where possible, of private and/or public funding partners;
- anticipated measurable outcomes;
- monitoring and evaluation process to be deployed to include effective mechanisms to measure the impact and scaling of the innovation identified in your proposal;
- Dissemination strategies for gathering and sharing learning;
- potential risks and strategies for mitigation;
- evidence that the plan developed is relevant in at least five EU Member States, two of which will be CEE Countries

2.10. From Streets to Homes Association is responsible for coordinating the procedures related to the impact assessment of the services provided. From Streets to Homes Association can be held responsible for the quality of the impact assessment, subject to timely implementation of the pilots, and partners' cooperation in selecting the treatment and control group and collecting the data.

2.11. All Parties need to provide all the information to From Streets to Homes Association that is needed for elaborating the financial and technical reports.

2.12. In accordance with its own usual accounting and management principles and in line with the „Use of the Grant” section, each Party shall be solely responsible for justifying its costs with respect to the Project towards the ESCF. Neither the Coordinator nor any other Parties shall be in any way liable or responsible for such justification of costs towards the ESCF.

2.13. A Party leaving the Consortium shall refund all payments it has received, with the exception of the amount of contribution accepted by ESCF or approved by FSHA.

2.14. All Parties have to work for achieving the measurable results – e.g. fulfilling the project indicators – indicated in Annex 1 of the Grant Agreement, „Develop plan to scale innovation “Scale-up strategies for the Social Housing Agency (SHA)””.

2.15. All Parties are obliged to participate in the internal project meetings.

3. RESPONSIBILITIES OF THE LEAD PARTNER

- 3.1. The nominated Project Coordinator is Vera Kovács (FSHA). In case of disputes that cannot be solved by the Coordinator, the parties present the case to a mutually accepted independent arbiter for mediation.
- 3.2. All contacts with the ESCF about the contract are only to be made through FSHA.
- 3.3. FSHA is responsible for the financial, technical and scientific coordination of the Project, consequently it is entitled to ask for any details of the project from all partners.
- 3.4. According to the Grant Agreement between the Consortium and the ESCF, the financial responsibility of each beneficiary shall be limited to its own debt, including any amount unduly paid by the ESCF as a contribution towards the costs incurred by its affiliated entities. Consequently each partner is responsible for its own part of the project.
- 3.5. The partners receive their share through FSHA's account. FSHA is responsible for promptly informing the partners of receiving the corresponding funds via email.

4. PAYMENTS

- 4.1. The financial contribution of the ESCF to the Project shall be distributed by FSHA to the partners in the following manner (based on the Grant Agreement between the Consortium and the ESCF), transferred to the partners within 3 business days after FSHA received each tranche:
 - First tranche of 30% to be paid within 21 days following the signing of the Grant Agreement;
 - Second tranche of 30% to be paid in May 2021 within 21 days following satisfactory review of the first progress report;
 - Third tranche of 30% to be paid in August 2021 within 21 days following satisfactory review of the second progress report;
 - Final tranche of 10% to be paid in October 2021 within 21 days following satisfactory review of the final report.
- 4.2. All payments are contingent on fulfilment of Terms and Conditions of the Grant Agreement, provision of requested information, and progress outlined in the Action described in **Annex 1**. Failure to do so can result in; delay of payments; reduction of payments; suspension of payments; termination of payments; and/or recovery of due amounts.
- 4.3. In the following circumstances the grant amount will be revised where costs are deemed ineligible (based on the Grant Agreement between the Consortium and the ESCF):
 - Costs are not in accordance with the budget set out in **section 6.10.**;
 - Changes over the 15% upwards or downwards adjustment allowed without seeking permission for amendments;

- The Parties have deviated from the Terms and Conditions and have not sought permission for such changes;
- The Parties are unable to meet the agreed Terms and Conditions.

4.4. FSHA will be separately accounted for although it may be commingled with your other assets.

4.5. FSHA will make all payments in euro.

4.6. The lead applicant bears the cost of transfers charged by its bank, and the party causing a repetition of a transfer bears all costs of the repeated transfer. The party causing a repetition of a transfer bears all costs of the repeated transfer.

5. GRANTEE GOVERNANCE AND MANAGEMENT ARRANGEMENTS

5.1. Parties will ensure that appropriate governance and management arrangements are in place to undertake activities for which this grant has been sought. The current executive and programmatic leadership will remain in place and will retain confidence. In the event of any change Parties will notify the Leader and provide the name(s) and contact details of alternative personnel including that of the Primary Contact.

5.2. By signing this agreement, Parties are confirming that the following information they provided is accurate and complete and does not omit anything relevant to an informed decision to make this grant:

- Evidence of adequate management and financial systems;
- GDPR compliance;
- Compliance with EU ethical standards;
- Commitment to gender equality

6. USE OF THE GRANT

6.1. This grant will be used solely for the purpose of the activities set forth in this document, and only as permitted by law, to achieve the Action as described in the Grant Agreement's **Annex 1**. attached.

6.2. This grant, or part thereof, will be returned to FSHA in the event that you are not in a position to utilise it for the Action set out in the Grant Agreement's **Annex 2 or section 6.10**. and you are obliged to alert FSHA of as soon as you become aware of the possibility of such an eventuality.

6.3. The budget attached in the Grant Agreement's **Annex 2 or section 6.10**. sets out the items of eligible expenditure, broken down by budget category, for which the grant will be used. Eligible costs include:

- Consultation with key stakeholders including service users/end lead applicant;
- Facilitation/expert assistance to clarify roles, responsibilities and intended resourcing of the implementation of plans to scale;
- Backfilling of senior executive staff where it is optimal to allocate dedicated time to develop plans;

- Local area/country/regional expertise; expertise to ensure plans are implementable across EU Member States.
- 6.4. The grant will only be used to fund approved budget items. Underspend in one budget line item will not be used to fund over-runs in other cost headings, unless it is up to 15% higher or lower than the original figure included in the estimated budget stated in section 6.10.; otherwise there is a requirement to seek written approval, in advance, of FSHA. Responsibility for budget overruns must be borne by each Party.
- 6.5. Capital costs are not eligible.
- 6.6. The Parties must ensure that purchases made represent best value for money or, if appropriate, the lowest price. This equally applies to the use and payment of subcontractors and/or third parties.
- 6.7. The activities for which this grant has been sought from the ESCF are not the subject of funding by another source (other than where complementary sources of funding were declared in the application).
- 6.8. Parties have to confirm that the grant, its proposed uses, and agreements do not conflict with any of their obligations.
- 6.9. Any unexpended funds from this grant must be returned to the FSHA promptly after the conclusion of the grant.
- 6.10. The budget attached in the Grant Agreement's **Annex 2** breaks down to the Parties. (attached Annex 2.)

7. MONITORING REQUIREMENTS

- 7.1. Progress reports will be provided by the Parties, or an appropriate representative of your organisation, by 15 April 2021 and by 15 July 2021 with a Final Report to be submitted by 20 September 2021. Templates for required reports will be forwarded to facilitate ease of reporting. Progress reports will include:
- An overview of progress towards the objectives of the action, including milestones and deliverables identified;
 - A finance report clearly showing expenditure to date against the estimated budget (included in section 6.10.).
- 7.2. Progress and Final Reports must be provided in English.

8. SHARING LEARNING

- 8.1. It is expected that members of the consortium will be willing to share learning and capabilities, as appropriate, and be open to having impact measured and evidence shared. The ESCF Genio Operational Management Team (hereafter referred to as GOMT) will facilitate shared learning opportunities including peer learning and guidance events in consultation with the consortium.

- 8.2. The parties agree that the copyrighted works resulting from their work will be shared with each other but will also be entitled to use them separately.

9. COMMUNICATION AND PUBLICITY

- 9.1. All grants may be subject to publicity by the Consortium members of the ESCF and European Union's Horizon 2020 research and innovation programme.
- 9.2. All grants will be listed on www.euscf.eu along with a brief overview of the initiative and a link to the relevant website, where possible.
- 9.3. Over the course of the year the ESCF will promote progress being made, through various media outlets and public events, with the purpose of highlighting positive progress and encouraging further development of the European Social Catalyst Fund. Where detailed information would be helpful for such purposes relating to the Project, the GOMT will consult the consortium in advance.
- 9.4. You may disclose the support freely. Unless the ESCF requests or agrees otherwise or unless it is impossible, any communication activity related to the Action (including in electronic form, via social media, etc.) funded by the grant must:
- Display the ESCF logo and
 - Include the following text for communication activities:

"This project has been supported by the European Social Catalyst Fund which has been established and co-funded by the European Union's Horizon 2020 Research and Innovation Programme, Genio, the Robert Bosch Stiftung and the King Baudouin Foundation.

10. PROJECT DURATION

- 10.1. The start date for the project is 01 February 2021.
- 10.2. The Final Report including the plan for scaling the innovation will be submitted by 30 September 2021.
- 10.3. It is expected that Parties will engage with the GOMT following the submission of their Final Report to provide information relevant to the ESCF Report and to participate in an event with other successful applicants to share Parties plan and the lessons learned while developing it during the preceding months. It is planned that this report will be published, and this will occur by the end of December 2021.

11. FORCE MAJEURE

- 11.1. Force majeure' means any situation or event that:
- prevents either party from fulfilling their obligations under the Agreement,
 - was unforeseeable, exceptional situation and beyond the parties' control,

- was not due to error or negligence on their part (or on the part of third parties involved in the action), and
- proves to be inevitable despite exercising all due diligence.

11.2. The following cannot be invoked as force majeure:

- any default of a service, defect in equipment or material or delays in making them available, unless they stem directly from a relevant case of force majeure,
- labour disputes or strikes, or
- financial difficulties.

11.3. Any situation constituting force majeure must be formally notified to the other party without delay, stating the nature, likely duration and foreseeable effects.

11.4. The parties must immediately take all the necessary steps to limit any damage due to force majeure and do their best to resume implementation of the action as soon as possible.

11.5. The party prevented by force majeure from fulfilling its obligations under this Agreement cannot be considered in breach of them.

12. LIABILITIES, GOVERNING LAW AND JURISDICTION

12.1. Each Consortium Partner shall be liable for damages caused in its area of interest but shall not be liable for damages caused to members of the consortium or third parties as a result of the implementation of this Agreement, including gross negligence.

12.2. This Agreement is governed by the applicable EU law, supplemented if necessary, by the relevant national law.

13. BANK AND CONTACT DETAILS

13.1. The bank details for receipt of grant:

(Complete in block capitals)

Grantee Name: BUDAPEST FŐVÁROS ÖNKORMÁNYZATA

Bank Name: OTP BANK

Bank Address: 16 NÁDOR UTCA, 1051 BUDAPEST

Bank Account Name: FŐV. ÖNK. ÁLTALÁNOS DEVIZA SZÁMLA

IBAN: HU26 1175 1841 0017 3883 0000 0000

Contact person: dr. Kittka Dalma

e-mail: kittkad@budapest.hu

14. FSHA Contact details

Benedek Csizmadia is your contact in the FSHA for this grant.

Email: csizmadia.benedek@utcarollakasba.hu

15. CONFIRMATION

Undersigned legal authorised representative, hereby consents to become a consortium partner relating to project „Scale-up strategies for the Social Housing Agency” and accepts in accordance with the provisions of the consortium agreement all the rights and obligations of a partner.

In witness whereof the representatives of the Parties hereto have agreed with and accepted all terms and conditions of this Agreement and the Grant Agreement related sections and have signed in good faith as fully representing their intentions.

Parties hereby agree to comply with all the terms and conditions stated in this document.

Parties understand that this grant is being provided on a once-off basis. I hereby indemnify and hold harmless the FSHA against any costs, expenses or damages arising out of any claim, demand or proceedings whatsoever incurred or suffered by any third party.

This consortium agreement is accepted and agreed.

Name: Vera Kovács

Signature:



Title: Vice president

On behalf of From Streets to Homes Association - Utcáról Lakásba! Egyesület (Consortium Leader)

Date:

Name: Ambrus Kiss

Signature:



Title: general deputy mayor

On behalf of Municipality of, Budapest (Budapest Főváros Önkormányzata)

Date: 2021 ÁPR 07.



Financial countersignatory:

Name: Ilona Nágel

Title: Sub-notary for Finances

On behalf of Municipality of Budapest (Budapest Főváros Önkormányzata)

Date:



A Fővárosi Közgyűlés 2021.03.31 - i ülése által
elfogadott szöveggel mindenben egyetemesen


Kókai Dóra Anna

támogatás- és projektmenedzsment osztályvezető
Közbeszerzési és Projektmenedzsment Főosztály



ANNEX 1.

ACTION: Develop plan to scale innovation “Scale-up strategies for the Social Housing Agency (SHA)”

Lead organisation: From Streets to Homes Association - Utcáról Lakásba! Egyesület

Consortium partner organisations:

- Metropolitan Research Institute
- Municipality of Budapest
- Habitat for Humanity Poland
- Municipal Institute of Housing and Renovation of Barcelona

Countries/areas where it is intended the plan will be implemented:

Budapest, Hungary

Overview

The proposed project will create an implementation plan for establishing a Social Housing Agency (SHA) in Budapest and carry out research on its upscaling potential to expand the extremely limited affordable rental housing supply of Budapest. The project leader, From Streets to Homes Association (FSHA) will cooperate with Metropolitan Research Institute (MRI) and the City of Budapest to implement the proposed activities. The Hungarian partners will work with Municipal Institute of Housing and Renovation of Barcelona (IMHAB) and Habitat for Humanity Poland (HfH Pl) to transfer knowledge, and in turn help them expand their existing housing initiatives.

Many European cities have been struggling with the lack of affordable housing, and this issue steeply exacerbated in the past years, affecting low income and vulnerable groups as well as many labour market entrants. Housing prices increased by 180% between 2015 and 2020, private market rents by about 40%, while disposable income only by 20%. Much of the demand is driven by investors, leading to a growing gap between household incomes and housing costs.

The project will develop measures to counteract this trend and will also contribute to reconceptualizing the housing policy of the City of Budapest. Numerous municipal officials in Budapest have been committed to expanding the very limited housing policy tools at their disposal, especially since the municipal elections in 2019. The City of Budapest in particular is developing a new urban housing concept, and the proposed SHA is expected to become one of its pillars. Consortium members FSHA and MRI are experts and future implementing partners of this housing concept.

Using the implementation plan, Budapest's new SHA will be launched in 2021. In the research we will match target groups with services and fine-tune the models and strategies to upscale the SHA in Budapest.

Partners from Barcelona and Warsaw are brought in because the share of public rental housing is similar in the three cities; and the partners have been operating Social Rental Agencies with comparable goals and operational models. They will be able to share knowledge and gain feedback to further expand their own activities. The City of Barcelona will use lessons learned to expand its model through utilizing former short-term rentals (AirBnb); while HfH Pl will focus on households affected by lower middle-income households who cannot afford purely market-based housing.

The SHA will use different methods to expand its affordable portfolio, combining purchase, construction on municipal land, utilization of vacant public rentals, and mobilizing the privately

owned stock with incentives for below-market letting. It will accompany its housing services with social work as needed, to ensure housing stability and security for all parties involved. FSHA will also expand its activities through working with Budapest and district municipalities and set up a knowledge exchange network with its international partners.

The consortium combines practical and theoretical knowledge. Project leader FSHA has been involved in developing a SHA scheme on a much smaller scale. MRI has been doing housing policy research for over 30 years. HfH PI is experienced in housing advocacy on local, national and international level, and operates a small-scale SHA in Warsaw. Finally, the municipal partners have practical knowledge and capacity to operate and upscale a SHA.

Main activities and methods to be used to develop this plan

Activities 1 focus on knowledge exchange among partner cities.

1.1 Partners assess the existing SHA models in the three cities identifying the main barriers to scale up SHA schemes and their underlying causes. Methods: online meetings and field visits to Barcelona and Warsaw

1.2 Partner cities (Barcelona and Warsaw) carry out research to overcome barriers to upscaling:

IMHAB will examine the possible ways to include former tourist flats into their SRA scheme based on Barcelona's new regulation on the Airbnb sector. Method: qualitative research with affected landlords

HfH PI will research a specific target group: those above the social housing income bracket, but too poor to enter the housing market (the "missing middle"). HfH PI has been successfully working with vulnerable groups but struggles to reach out to this target group. This would also make their SHA model financially more balanced. Method: focus group research

1.3 Final knowledge exchange will discuss the adaptability of Budapest SHA Implementation Plan for Barcelona and Warsaw, and the possibilities to use the Airbnb sector and involve the "missing middle" group in the SHA models. Method: workshop in Budapest.

Activities 2 will analyse the supply side of Budapest SHA.

2.1 Surveying private landlords and real estate agencies to assess landlords' expectations and risks in the private rental market and estimate the cost of integrating them into the SHA model. (FSHA, MRI)

2.2 Evaluating the housing management system of the Municipality of Budapest to identify the part of the stock to be included in the SHA pool. Surveying district municipalities' potential willingness, pros and cons to join the Municipality's initiative (MB, FSHA, MRI)

Activities 3 will examine the various target groups of the Budapest SHA (vulnerable groups and the "missing middle", or working poor)

3.1 Characteristics of the target groups will be defined through secondary data analysis (household and income surveys).

3.2 Validity of the results will be verified with qualitative methods (focus groups) to test the solvency and housing needs of the defined groups. The research will also survey the needs of vulnerable groups (e.g. single parent families, Roma people, elderly, disabled, homeless) in terms of support services. Reflecting cycles with target group members will be held to embed their input on the proposed solution. (FSHA, MRI)

Activities 4 develop the detailed implementation plan of Budapest SHA. It will define:

4.1 The organisational and operational structure of the SHA, its main tasks and responsibilities and the related legal regulation. It will design the composition of the housing stock and tenants, and the content of tenant related support services. It will develop the strategy to procure private rentals, including advocacy strategy towards landlords and the public.

4.2 The financial model of SHA by calculating the rent levels and related rent subsidy system to ensure housing affordability for SHA tenants; as well as the costs of including private and public rentals into the scheme (renovation costs, guarantee in case of vacancy or non-payment etc.) and further expansion of the model through construction/purchase of housing. (MB, MRI, FSHA.)

Activities 5 cover the dissemination of the project results. Partners will produce materials and hold/participate in events to advocate the SHA model.

Timeframe

The project will start with an online kick-off meeting to produce the detailed work plan in Month 1, assessing partners' tasks and responsibilities for the upcoming eight months.

Activities 1 begin from Month 1 with online meetings among the three partner cities, to identify the main barriers to fine tuning and expanding their existing SRAs (1.1). Most of the related online discussion will be held in the first two months, while field visits to Barcelona and Warsaw are scheduled to Months 3-5 (depending on the COVID situation).

Starting from Month 2 up until Month 6, IMHAB and HfH PI will carry out their own research on the indicated specific issues (1.2).

Once information from all cities has been gathered, Activities 1 will conclude in Months 6 and 7, where partners discuss the transferability and adaptability of outcomes for each city in a workshop held in Budapest.

Activities 2-4 will cover research related to the Implementation Plan of Budapest SHA and the actual elaboration of the plan.

Activities 2 and 3 (the Budapest supply and demand analyses) will occur simultaneously starting from Month 2 and concluding in Month 5. These consist of research on the private market (2.1) and the municipal sector (2.2), as well as the target group related quantitative and qualitative analyses (3.1 and 3.2). The proposed budget allows for in-depth qualitative research, comprising of 3 to 5 small focus group interviews with real estate agents; and five rounds of small focus group interviews (8-10 individuals each) with target group members, where every target group is represented by at least one focus group.

Activities 4 will begin in Month 4, when the consortium begins the elaboration of the Implementation Plan, to be finalized by Month 7. This will define the organizational structure, the financial model and the regulatory background of the Budapest SHA with a strategy for inviting private landlords and district municipalities.

Activities 5 comprise the individual dissemination events in the three cities in Month 8.

Hungarian partners organise a national workshop and produce a guide for establishing a municipal social housing agency

HfH PI will organise a workshop for Polish municipalities

IMHAB will present the results in the presented at the Social Forum and/or Annual Assembly of the Spanish Association of Social Housing Managers.

In order to ensure broader national and international publicity of the outcomes of the project, partners will develop specific materials in Month 8.

FHSA develops a guide for Hungarian municipalities and non-profits intending to establish a municipal social housing agency.

IMHAB and HfH PI will summarize main findings and outcomes on possibilities for upscaling SHAs in the context of their own city/country.

MRI develops an options paper on the possible transfer and adaptability of research results for Eastern and Southern European cities.

Deliverables to be submitted to the European Social Catalyst Fund (ESCF) Genio Operational Management Team (GOMT).

Two Progress reports to be submitted by the 30 April 2021 and 31 July 2021, respectively to include:

- **an overview of progress towards the objectives of the action (described in this Annex 1) including milestones and deliverables identified;**
- **A finance report clearly showing expenditure to date against the estimated budget (included in Annex 2).**

Final Report to be submitted by 30 September 2021 containing your plan for “scaling Social Housing Agency (SHA)” in Budapest and sharing lessons learned in developing the plan that could be helpful to others.

The description of your plan must address the following issues:

- **detailed description of the innovation whether place-based and/or digital solutions are being planned;**
- **the scope of the scaling intended with supporting evidence of potential to succeed – i.e. where the innovation is planned to be implemented and the potential number of service users/end beneficiaries that will be targeted;**
- **timeframe and milestones – it is expected that the plan will seek to be implemented to a substantial level of scale within two years;**
- **cost and nature of current response (where this exists) to service users/end-beneficiaries;**
- **consultation with intended service-users/end beneficiaries;**
- **mechanisms for scaling and sustainability – description of how the scaling is intended to take place and how it will be sustained;**
- **financing arrangements - what will be the costs and who will be the funders – please provide evidence of written agreements, where possible, of private and/or public funding partners;**
- **anticipated, measurable outcomes;**
- **monitoring and evaluation process to be deployed to include effective mechanisms to measure the impact and scaling of the innovation identified in your proposal;**
- **Dissemination strategies for gathering and sharing learning;**
- **potential risks and strategies for mitigation;**
- **evidence that the plan developed would be relevant in at least five EU Member States, two of which will be CEE Countries.**

Risk management and mitigation strategies that will be utilised in the development of the plan.

Due to the COVID-19 situation, the consortium has to assess the range of activities that can be carried out online without jeopardizing the research process. Kick-off meetings, interviews and focus groups are planned for both in-person and online implementation. This may incur minor methodological changes, which are foreseen and planned for by the research team.

Also due to the pandemic, municipal resources may be strained. In Warsaw and Barcelona, the SRAs already operate, and the Budapest partners are also currently preparing SHA implementation. Even if the launch of the actual agency may be delayed due to a wave in the pandemic, operational, financial, and upscaling models could still be developed and evaluated, to be used once the project can finally be launched. The political commitment towards strongly improving housing policy, and within it, launching the SHA in Budapest is solid, and the current committed municipal officials remain in charge until 2024.

NGO partners from the three cities are open to exploring the possibility of involving former short-term rentals as part of the SHAs. The three cities and the respective countries have different regulations on short term renting, although a number of factors (economic shifts, or the pandemic and its aftermath, among others) may bring about changes in these regulations and market situations as well. If legal or market changes occur which could significantly influence research outcomes, the team will adapt its process and - if necessary - methods to respond to the upcoming challenges.

During the preparation of the Budapest project, the team expects to face legal obstacles and barriers that could slow the process. For this reason, the consortium budgeted for the participation of a lawyer or attorney both in the preparation and the main research phase of the project, to help prevent or overcome legal difficulties.

The changing political and financial environment of the three cities is also a potential source of risk, made even more acute by the pandemic and its economic and social impact. This affects housing markets as well as the income of target groups. The team is prepared to undertake reassessments and recalculations as necessary.

To mitigate these risks, the research team will ensure constant monitoring as part of the research project. Service provider partners (FSHA, HMI PI, IMIAB) have expert knowledge on supporting their clientele even as its needs and possibilities change over time, and are prepared to lobby on behalf of their clients if necessary. The consortium may need a contingency fund to secure our tenants' situation if needed and consider the possibility of interlinking the three service provider partners in this process.

ANNEX 2.

#	Budget item title	Amount in €	FSHA	MB	MRI	IMHAB	HfH Poland	Budget Category
	Total	95 901	30 779	19 429	24 207	10 500	10 986	
1	Activity 1.1 Knowledge exchange between the three cities on barriers to upscale SHAs	7 806	1 321	2 300	1 941	1 000	1 244	Salary
2	Activity 1.2 IMHAB's research on the possible inclusion of Airbnb flats in their SHA scheme	4 000				4 000		Salary
3	Activity 1.2 HfH PI's research on the specific target group of the working poor ("missing middle") in order to include them on a larger scale in the SHA's scheme.	933					933	Salary
4	Activity 1.2 HfH PI's research on the specific target group of the working poor ("missing middle") in order to include them on a larger scale in the SHA's scheme.	4 000					4 000	Third party contractor
5	Activity 1.3 Final knowledge exchange between partners in the three cities to discuss research findings and the outcome of the Budapest implementation plan.	12 544	3 024	1 875	2 156	3 000	2 489	Salary
6	Activity 2.1 Surveying private landlords in Budapest in order to calculate costs related to their inclusion in the SHA scheme (Supply side analysis)	4 173	2 016		2 157			Salary
7	Activity 2.2 Examining the housing management system of Municipality of Budapest and surveying district municipalities about their attitude to join a city-district SHA model (Supply side)	4 414	1 008	1 250	2 156			Salary
8	Activity 3.1 Identifying the main characteristics the target groups based on secondary data analysis (quantitative demand side research)	3 235			3 235			Salary
9	Activity 3.2 Qualitative analysis of SHA target groups to validate the quantitative research results and assess the needs of different target groups.	7 197	5 040		2 157			Salary
10	Activity 4.1 Elaboration of the organisational and operational structure of the Budapest SHA	13 729	2 016	7 400	4 313			Salary
11	Activity 4.2 Development of the financial model of Budapest SHA	7 821	1 008	2 500	4 313			Salary
12	Activity 5. Dissemination activities in the three cities	4 757	1 512			2 000	1 245	Salary
13	Travel costs related knowledge exchange activities	9 333	5 950	1 604	1 779			Travel
14	Costs related to partners' meetings and dissemination meetings.	2 425	1 300			500	625	Meetings
15	Research assistance for Budapest focus group research	700	700					Third party contractor
16	Room rental for Budapest focus group meetings	500	500					Other
17	Translation	2 810	2 360				450	Third party contractor
18	Project coordination	5 524	3 024	2 500				Salary

