sciendo

LATVIAN JOURNAL OF PHYSICS
AND TECHNICAL SCIENCES
2025, N 1

DOI: 10.2478/lpts-2025-0004

REGULATION AND ORGANISATION OF HOUSING MANAGEMENT ACTIVITIES IN GERMANY, POLAND AND LATVIA

I. Amolina[1*], A. Kundzina[1], I. Geipele[1],
K. Höller[2], A. Rajkiewicz[3], M. Auders[4]

[1] Riga Technical University,
Faculty of Engineering Economics and Management,
Economics and Business Institute,
6-210 Kalnciema Str., Riga, LV-1048, LATVIA
[2] Housing Initiative for Eastern Europe (IWO e.V.),
Alt-Moabit 101A, 10559 Berlin, GERMANY
[3] Energy Conservation Foundation (FPE)
Świętokrzyska 20, 00-002 Warsaw, POLAND
[4]Ministry of Economics Republic of Latvia,
Department of Housing Policy
55 Brīvības Str., Riga, LV-1519, LATVIA
*e-mail: iveta.amolina@rtu.lv

Multi-dwelling buildings are one of the essential infrastructural elements of a residential area. Therefore, qualitative and professional management of such real estate is of importance. The insufficient investment into maintenance and improvement of housing is stated in Latvian policy planning documents as one of the most significant problems, causing risks for achieving the goal of compliance of the housing fund with energy efficiency, construction, safety and amenity standards.

The article examines the main aspects of management of residential buildings, identifies the related risks and offers solutions for their prevention. The article aims at emphasising the significance of building maintenance and exploring management processes of residential buildings in Latvia, Poland and Germany, making a comparison that helps to understand the housing management regulation and organisational approach in each country and identify their common and differing features.

In the course of the research, the authors of the article review the sources on management activities of residential buildings, identify and assess the management process risks and make a comparative analysis of housing management processes in Latvia, Poland and Germany.

Information regarding the housing management field of the countries examined in the article has been obtained by summarising and analysing the policy documents and regulatory enactments, as well as by interviewing Latvian, Polish and German experts.

When analysing the obtained results, conclusions have been made with regards to political responsibility, legal regulation and professional competence requirements in the field of housing management.

Keywords: *Housing management, housing policy, multi-dwelling buildings, residential buildings.*

1. INTRODUCTION

The economic growth of residential areas depends largely on its infrastructure, which is formed by a number of different elements. Multi-dwelling buildings are one of the essential infrastructural elements of a residential area which depreciate with time. Therefore, qualitative and professional management of such real estate is of importance. By not performing the due maintenance and timely restoration of some elements of the infrastructure, deterioration of their technical condition and transformation into slum is inevitably approached.

Latvian policy planning documents stipulate that it is required to ensure the development of all types of infrastructure and improvement of its quality, availability of basic services and qualitative housing. National Development Plan of Latvia for 2021–2027 sets goals for compliance of the housing fund to the energy efficiency, construction, safety and amenity standards [1]. Housing Availability Guidelines for 2023–2027 stipulate that insufficient investment into maintenance and improvement of housing is one of the most significant problems [2].

One of the main obligations of owners of residential buildings is to ensure housing management, which also includes decision-taking related to their building management and conclusion of transactions. If the owners do not ensure the housing management themselves, such activity is assigned to a professional manager.

To ensure professional and sustainable management, the manager should inform the owners on the content of services, technical features of the administered facility, opportunities for improvement, maintenance costs and other factors related to the management process. Rights and obligations of the manager should be considered in connection with the assigned volume of the management task, which is stated in writing in the concluded management authorisation agreement.

Management of multi-dwelling buildings is a functional process of mutual interaction, which is ensured by observing the continuity principle in order to implement a set of organisational, economic, engineering, legal, political, social, technological and informative activities aimed at effective management, which is performed in order to achieve extension of the housing life cycle, safe operation of the residential building, observation of human health and environmental safety principles in the context of the housing sustainable preservation [3]. The priority accorded the issue of housing in emerging markets is immense; to

most governments, the availability of sufficient but basic housing for all is often stated as a priority for enhancing the social needs of society [4].

Currently, there are no uniform requirements in the European Union regarding the housing management process and the managers as such. Each member state has a different practice in regulation of the housing management process, determining the limits of responsibility between the parties involved in the process, requirements to their education and qualification, and support mechanisms. However, there is one common goal – to ensure the appropriate maintenance of the housing fund, enabling to maximally extend the housing life cycle. Buildings have been amongst the most valuable assets of any nation in the sense that they provide people with shelter and facilities for work and leisure. It is known that the specific perspective of building maintenance still does not receive the attention it should [5], [6].

In many cases, especially in Western Europe, owners of multi-dwelling buildings delegate their housing maintenance to a professional management enterprise. Whereas the characteristic situation for Eastern Europe is when owners of multi-dwelling buildings are natural persons, who live in the apartments owned by them [7].

The article examines main aspects of management of residential buildings, identifies the related risks and offers solutions for their elimination. The authors analyse activities related to housing management in Latvia, Poland and Germany, making a comparison regarding the political responsibility, legal regulation and the professional competence requirements in this field.

2. METHODOLOGICAL APPROACHES

The article aims at emphasising the significance of building maintenance and exploring management processes of residential buildings in Latvia, Poland and Germany, making a comparison in order to understand the housing management regulation and organisational approach in each country, common and different features, as well as evaluating which of the activities could be taken into consideration and included in implementation of the national housing management process.

In the course of the research, the authors of the article:

- review the sources on management activities of residential buildings,
- identify and assess risks when organising the housing management process,
- make a comparative analysis of housing management processes in Latvia, Poland and Germany.

To make the comparison, indicators such as the requirements to education of real estate managers, training opportunities, the manager's role in the real estate administration and chief management activities have been used.

The authors of the research have identified the criteria for evaluating the opportunities to improve training of managers of multi-dwelling buildings and to include topical themes in the study process. It has been clarified in the course of the research what skills need to be developed or studied more profoundly during the training, for example, a more profound understanding of climate change issues and increasing energy efficiency of buildings, as well as of digitalisation issues.

Information regarding the housing management field of the countries exam-

ined in the article has been obtained by summarising and analysing the policy documents and regulatory enactments, as well as by interviewing Latvian, Polish and German experts. Identification and analysis of the main management activities is based on regulatory enactments. The article uses materials from the European Climate Initiative – EUKI[1] project "CLI-MA (From Housing Manager to CLImate MAnager)".

3. MANAGEMENT OF RESIDENTIAL BUILDINGS IN LATVIA

Management of residential buildings is a long-term process, where the decisions taken affect the situation in the future. In total, about a half of the European Union residents (46.4 % in 2021) live in multi-dwelling buildings [8]. Thus, the issue of management of residential buildings and its optimal organisation is very topical.

Well-being of any resident of an apartment depends on the way the management process is organised; therefore, owners have to take a decision regarding who will provide management of the residential building. Efficient and qualitative management of residential buildings promotes a more active involvement of house residents in organising the management process, which, in its turn, makes the manager's work transparent and facilitates its quality control, as well as the efficient usage of financial resources. The type of apartment ownership is closely related to the remaining residential property of a particular building. To ensure the harmonious development of residential property, the apartment owners, on the basis of the existing laws and regulations, as well as mutual decisions, jointly agree on further maintenance, development of the building, efficient use of resources and management [9].

3.1. Management Activities in Latvia

One of the most important directions of management of residential buildings in Latvia and other Eastern European countries is their maintenance and sanitary cleaning, which are performed for the purpose of supporting the respective aesthetic place of residence and environment. Technical support includes maintenance, repairs, fast response in the event of detecting defects, as well as technical inspections, in order to avoid premature damage of the facility and its engineering systems, organisation of repairs [10]. Sanitary cleaning and improvements in a residential building is a service that ensures cleanliness in the building and its entire territory by tidying and cleaning internal premises in accordance with the requirements of the owners and users [11].

Types and strategies of technical support or maintenance can be classified as follows:

- Preventive maintenance, which is performed at certain previously set time periods or in accordance with the previously set criteria and intended to reduce the possibility of errors or deterioration of the object functioning,
- Maintenance based on the actual technical condition, which is performed based on the prophylactic technical inspection and observing the dynamics and/or parameters and the following activities.

[1] EUKI (Die Europäische Klimaschutzinitiative) is a project financing instrument formerly provided by the German Federal Ministry for the Environment, Nature Conservation, Nuclear Safety and Consumer Protection (BMUV) and today managed by the German Federal Ministry for Economic Affairs and Climate Action (BMWK).

Repairs or maintenance are performed when a deficiency is revealed and the unit is to be renovated, in order to restore the required performance.

Housing management includes a range of routine activities:

- Organisation of public utilities, e.g., water, electricity, heating and waste removal,
- Planning and ensuring performance of maintenance, repairs and sanitary cleaning,
- Management of financial resources, including development and administration of the housing budget, collection of payments from owners and preparation of reports on expenses,
- Communication with owners and other involved parties, e.g., municipality and service providers.

Housing management encompassing activities are illustrated in Fig. 1.

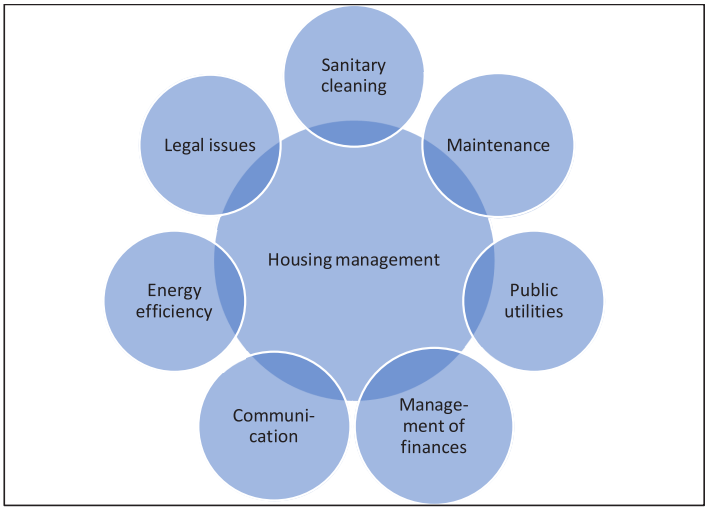


Fig. 1. Housing management activities

Housing management encompasses a number of categories, including technical management (maintenance, renovation, etc.), financial management (housing financing, housing policy) and operational (daily) and strategic housing management activities. It encompasses short-term decisions and activities such as response to routine problems, as well as mid- and long-term management policy [12].

Management of residential buildings includes services such as supervision of agreements, organisation of repairs and renovations, preparation of reports on lease activities and their administration, representation of the owner at court, filing of all technical and legal documentation of the house, as well as consulting owners on real estate strategic management.

Housing management encompasses not only ensuring of the general technical condition of the building, but also improvement of its energy efficiency. The housing manager should ideally be capable of stimulating owners to implement projects to increase energy efficiency of the building.

Stability of the place of residence is directly connected to safety of the building, which means ensuring that strangers do not get into the building and the property is not damaged as a result of unforeseen accidents. Also, the arrangement of lease relations in the respective country is vital here [13].

3.2. Management Process Organisation in Latvia

Housing management can be organised both by societies established by residents (owners of apartments) and owners, and by professional managers. In view of the aforementioned, it can be concluded that the following consecutive steps have to be observed in assigning the management order binding for the parties:

- A society of apartment owners of the residential building has to take a decision on choosing the management form and the draft agreement provisions,
- If it has been chosen to assign the housing management to a company or a professional manager, a management agreement has to be concluded between apartment owners and the manager on fulfilment of the management assignment,
- If it has been chosen to ensure management without an intermediary, owners agree between themselves on the duties to be taken and the provision of financial resources.

Each management form is characterised by different types of risks, for example, lack of professional skills, lack of capacity (capacity includes increase of work quality and efficiency of managers, improvement of development and introduction of the policy of actions, improvement of cooperation and coordination between all parties involved in the management process), non-professional accounting of the budget, lack of cash resources, etc. Possible risks in-line with bad management are comprehensively described in Table 1.

Table 1. Housing Management Risks for Residential Buildings

<table>
<tr><th>Apartment Owners</th><th>Society of Apartment Owners</th><th>Professional Manager</th></tr>
<tr><td colspan="3">Lack of professional skills</td></tr>
<tr><td>Performance of unnecessary repairs (funds are invested in improving visual appearance of the building but not in improving safety of the building structures or energy-efficiency increase)</td><td>No skills in taking professional decisions and determining priorities when making repairs</td><td rowspan="2">Weak theoretical knowledge but practical skills available. Thus, an erroneous decision can be taken, not observing requirements of regulatory enactments and standards.
Poor or no skills in applying theoretical knowledge and regulatory requirements in practice.</td></tr>
<tr><td colspan="2">Insufficient knowledge regarding regulatory requirements
Lack of technical knowledge
Lack of skills in organising the management process
Errors in work with documents</td></tr>
<tr><td colspan="3">Lack of knowledge of climate change issues and energy efficiency in general</td></tr>
<tr><td>Lack of knowledge in final benefits from introducing energy efficiency measures. Do not believe in the human effects on climate changes.</td><td>Weak knowledge on measures and actions in order to improve the capability to adjust and facilitate stability regarding climate change and its consequences.</td><td>There are theoretical but no practical skills regarding measures and actions in order to improve the capability to adjust and facilitate stability regarding climate change and its consequences.
Very general approach to implementation of energy efficiency measures and the subsequent maintenance of the building.</td></tr>
<tr><td colspan="2">Insufficient knowledge regarding the impact of climate change on different industries of the national economy and the society in general.</td><td></td></tr>
<tr><td></td><td colspan="2">No skills to develop a long-term energy efficiency strategy for the building.</td></tr>
<tr><td colspan="3">Lack of capacity</td></tr>
</table>

<table>
<tr><th>Apartment Owners</th><th>Society of Apartment Owners</th><th>Professional Manager</th></tr>
<tr><td>Insufficient resources to perform the required works, for example, regular repairs and prevention of accidents.
Only few owners are involved in the management process.</td><td>Lack of professionals, resulting in errors in budget planning (insufficient funds for management and repairs).
Non-professionally concluded contracts on repair, renovation and other works.</td><td>Insufficient planning and organisational capacity; it is not possible to organise fast emergency works.
Insufficient knowledge on specific technical activities, materials, equipment, etc.</td></tr>
<tr><td colspan="3">Non-professional accounting of the budget</td></tr>
<tr><td colspan="2">During the management process, accounting reports are not prepared with due quality and are not submitted within the deadlines set in the regulatory enactments, the cash flow (incomes and expenses) is not accounted precisely.</td><td>Due to lack of professionals, accountants are employed, who are not familiar with the housing management specifics and make errors in the accounting files.</td></tr>
<tr><td colspan="3">Lack of cash resources</td></tr>
<tr><td></td><td colspan="2">There is a lack of financial resources to pay the employees.</td></tr>
<tr><td colspan="3">Accruals are not made, there is shortage of cash flow and lack of cash for the planned works.
If owners of the residential building do not pay for services in due time, penalties may be calculated and/or provision of services may be terminated.</td></tr>
</table>

To prevent the aforementioned risks in the course of the management process, it is required to select responsible people and employees with professional knowledge in the respective field. If employees have insufficient professional skills, it is possible to improve these, e.g., by providing and participating in trainings, seminars, etc. It is also possible to attract professionals in the respective filed pursuant to an agreement. Whereas, if a risk has already turned into a problem, knowledgeable people or experts have to be sought to evaluate the situation and provide proposals for a solution of the situation.

Where knowledge regarding energy efficiency issues and climate change is insufficient, general or mostly theoretical, it is required to plan professionally and determine the specific directions of activities, in order to adjust to climate change more successfully. In such a case, professional competence and skills to attract appropriate specialists are significant.

To prevent the capacity risks, already during the planning process, it is necessary to analyse different situations regarding the performance of work, providing specific solutions. It is also recommended to conclude agreements with the required service provider, who will be involved in solving an occurring problem when needed. For example, repairs are started, which have to be finished until a certain deadline, but there is insufficient labour force to complete the work – additional workers have to be sought and contracted.

To avoid non-professional budget accounting, the solution is to employ professional accountants, as well as to observe the so-called “four eyes” principle, so that, when organising financial accounting, a minimum of two employees participate in performing the specific functions.

To prevent lack of cash resources, it is required to form cash accruals, to perform the result-focused reminder or warning process regarding non-payers, as well as to start the debt collection process against them. It is possible to borrow lacking financial

resources at credit institutions (in such a case, loan interest has to be taken into account as additional expenses).

The identified risks and solutions for their prevention indicate to the importance of competence, qualification and training of persons who ensure management activities.

4. COMPARISON OF HOUSING MANAGEMENT IN GERMANY, POLAND AND LATVIA

4.1. General Comparison

Management of residential buildings requires increasingly more complex knowledge, skills and competences. Within the framework of the research, to obtain an idea about the approach of different countries, housing management conditions in Germany, Poland and Latvia have been compared regarding both, general issues (political responsibility, formal and informal education) and specifically renovation of buildings and energy efficiency increase issues. Information on general housing management conditions is summarised in Table 2 and text of this subchapter [14], [15], [16].

Table 2. Comparison of General Housing Management Conditions in Germany, Poland and Latvia

Germany	Poland	Latvia
Who is politically responsible for housing management?		
Ministry of Justice Ministry of the Interior and Community Ministry for Economic Affairs and Climate Action	Ministry of Development and Technology Ministry of Infrastructure Ministry of Internal Affairs and Administration	Ministry of Economics
Is the certification of the housing managers compulsory?		
No[2]	No	Yes
Is any non-compulsory training available?		
Yes	Yes	Yes
Are the housing managers represented by a central or regional association?		
The Association of Real Estate Managers Germany (VDIV) with 10 regional associations, The Federal Association of Real Estate Managers (BVI) Membership is voluntary	Over 20 local associations and 4 Federations of associations Membership is voluntary	The Association of Management and Administration of Latvian Housing (AMALH) Membership is voluntary

With regards to political responsibility, regulation and responsibility (property rights, construction requirements, different support mechanisms) of housing management aspects in Germany and Poland are divided between different ministries. For example, in Germany, the Ministry of Justice is engaged in issues of property rights, the Ministry of the Interior in construction issues and the Ministry for Economic

2 Latest amendments to the Act on the Ownership of Apartments anticipate starting certification of housing managers at the end of 2023 (at the earliest).

Affairs and Climate Action in housing subsidies and climate issues.

A similar system exists in Poland. Regulations concerning technical requirements of the building and its energy efficiency are included in the Ordinance of the Ministry of Infrastructure Technical conditions to be met by buildings and their location. The Ministry of Development and Technology is responsible for territorial planning and real estate management. The Ministry of Internal Affairs and Administration is engaged in EU funds support mechanisms.

In Latvia, both, construction and housing industries are under the supervision of the Ministry of Economics. Construction in the competence of the ministry encompasses the development of the industry policy and improvement of the system of regulatory enactments. The aim of the housing policy is defined as promotion of the housing quality and accessibility, developing the appropriate regulatory base for efficient management of residential buildings and supporting energy efficiency measures there.

To jointly solve the respective sector's problems, housing managers in all three countries are united in different associations:

- The Association of Real Estate Managers in Germany (*Verband der Immobilienverwalter Deutschland/VDIV*) is the largest industry association representing the interests of property managers at the national level. The Association unites more than 3,600 members, who administer about 8.2 million apartments. The VDIV Germany is supported by 10 regional associations.
- Poland has more than 20 regional associations and four federations of associations (*Polska Federacja Stowarzyszeń Zawodów Nieruchomościowych/Polish Federation of Real Estate Associations, Polska Federacja Rynku Nieruchomości/Polish Real Estate Federation, Polska Federacja Organizacji Zarządców, Administratorów i Właścicieli Nieruchomości/Polish Federation of Real Estate Managers, Administrators and Owners, Federacja Porozumienie Polskiego Rynku Nieruchomości/ Federation of the Polish Real Estate Market*).
- The Association of Management and Administration of Latvian Housing (AMALH) is a public organisation that unites natural and legal persons in Latvia having interest in reaching joint objectives as for management and administration of real estate. The Association unites more than 40 legal persons engaged in real estate management.

In Germany, ownership and all relations within this context are regulated by the Act on the Ownership of Apartments (*Wohnungseigentumsgesetz/WEG*). This regulatory enactment provides also the management (administration) regulation. In accordance with latest amendments to the law, starting from 1 December 2023, apartment owners can request the appointment of a certified manager. The certification is no obligation in appointing a certified administrator. The certification is the means for increasing the quality of property management companies and, hence, also professional skills of the property manager. Property managers do not need to have a special education/ certificate to start their business, but they are obliged to have a certain number of hours of advanced training/further education (*Weiterbildung*) to be allowed to continue their activities. In Germany, the Act on the Ownership of Apartments does not provide a definition of the housing manager's profile, but the law stipulates that

the manager represents the Homeowners' association. Management activities in the real estate field mean technical, financial, legal and organisational tasks to be solved in the course of the facility administration. The specific tasks of the manager are set by owners (homeowners' association/HOA) of the administered facility.

In Poland, the real estate industry is regulated by the Real Estate Management Act. From late 1990s until 2013, the profession of property manager required a state professional license. Following amendment of the law in 2013, licencing is no more required, and the scope of real estate management must be specified in a real estate management contract signed by the owners, a housing association or another person holding the right to the real estate. According to the Polish classification of activities, a real estate administrator is defined as a natural person who takes responsibility for the maintenance of a given real estate. The Real Estate Management Act defines a real estate manager as an entrepreneur who conducts business in the field of real estate management. Real estate management consists of making decisions and performing activities whose goal is ensuring real estate management.

In Latvia, administrative activities, obligations, as well as education and vocational qualification requirements for housing managers are determined in the Law on Administration of Residential Buildings. The manager/administrator in Latvia is defined as an adult natural person or a legal person with the capacity to act, who on the basis of an administration contract performs the administrative activities assigned by the owner/s of a residential building.

For the management of multi-apartment buildings in Latvia, vocational education is necessary and a document certifying at least a fifth level of vocational qualification is obligatory. In some cases, a fourth level vocational qualification is sufficient (e.g. housing manager is an owner, who is personally managing a residential building belonging to him or her; or an owner, who has been authorised to perform management activities by the other residential building owners).

It can be concluded that all three countries have legal regulations for housing managers and the field of their operation. In Germany and Poland, such requirements of a comparatively general kind and are more specifically determined by apartment owners who assign and contract the manager. In Latvia, the activities, tasks, competences and responsibility of housing managers, as well as their qualification requirements, are stipulated more comprehensively. Currently, the Ministry of Economics of the Republic of Latvia drafting a new law for management of residential buildings, anticipating significant changes in the authority of housing managers. It is planned to strengthen the role of the housing manager as a qualified expert, who will be capable of providing apartment owners with information on works to be performed in order to meet the requirements set by regulatory enactments with regard to construction and energy efficiency.

In Germany, as mentioned before, property managers do not need to have a special education to start their business, but In order to become a certified administrator, a person must pass an examination at the Chamber of Industry and Commerce (*Industrie- und Handelskammer*) to confirm that the potential housing manager has the necessary legal, technical and economic/financial knowledge. Also, a person, who has completed vocational training as a real estate agent or as a merchant in the real estate and housing industry, who has a recognized qualification as a certified real

estate specialist, or who has a university degree with a focus on real estate, can be acknowledged as a certified administrator.

In Poland, there are no requirements regarding education, experience and qualifications confirmed by an exam to act as a professional manager. Only few chapters in the Real Estate Management Act refer to the professional requirements for the job as housing managers. The database of managers is maintained by the Polish Real Estate Federation. About 2,350 managers with valid licenses are registered there. There is also the Polish nationwide Register of Property Managers of the Federation "Polish Real Estate Market Agreement". It is a register of natural persons who obtained an optional and voluntary license of this federation. About 3,000 managers are registered there.

In Latvia, a fifth level vocational qualification is obtained after four years of studies at the Bachelor level, which covers 160–180 credit points (1 Latvian credit point corresponds to 1.5 ECTS). To obtain a fourth level vocational qualification, it is required to graduate the programme with a volume of not less than 960 hours. Housing manager is included in the list of mandatory applicable occupational standards. Housing managers must register in the Register of Residential Building Managers of the Building Information System (BIS). Currently (as of 7 February 2024), 1,219 managers are registered in the BIS. The BIS is under the supervision of the State Construction Control Bureau of Latvia and, hence, the Ministry of Economics.

In all three countries, building managers have the opportunity to upgrade their competences by attending different courses and trainings. Having reviewed opportunities for additional education, a high activity is detected in Poland. Associations of building managers provide basic vocational training for managers. For example, a person who completes the course and passes the test exam receives the License of the Property Manager of the Polish Federation of Real Estate Market and is registered in the Central Register of Managers run by the Polish Federation of Real Estate Market. The syllabus is based on that of the European Real Estate Council course. The course is organised in the form of four weekend seminars (60 academic hours). It covers the following themes:

- Property management as a professional activity,
- Legal elements in real estate management,
- Technical aspects of real estate management,
- Economic and financial basics in real estate management,
- Residential property management,
- Management of non-residential real estate,
- Sources of information about real estate,
- Interpersonal communication in the profession of a real estate manager,
- Local inspections of the property.

Other associations in Poland also offer training courses that help raise the qualification levels of its members. Mostly, these are online trainings lasting from 4 to 8 hours. In Latvia and Germany, associations of housing managers also offer courses of different length (mostly between 4 to 20 hours) on specific topics, e.g., finances, support mechanisms, accounting, technical inspection, etc.

Having evaluated the qualification requirements of housing managers, it can be concluded that the highest professional qualification requirements to managers of residential buildings are in Latvia, as a certain professional qualification level is

required, which can be obtained only upon completion of a full Bachelor programme, respectively by studying for four years. In Germany, qualification requirements for housing managers are being developed but are not (yet) mandatory. In Poland, there are no mandatory requirements to the education of housing managers.

Role of Housing Manager in Increasing Energy Efficiency

Having researched the policy guidelines, legal regulation and requirements to professional qualification of housing managers, it can be concluded that in all three countries the housing policy and legal enactments determine orientation towards the necessity of increasing energy efficiency of buildings. With regards to duties of the housing manager, up to now the emphasis has been on maintaining the technical condition, sanitary cleaning, ensuring public utilities, management budget planning and financial accounting. However, recently, the situation has changed. For example, in Latvia, the occupational standard was developed and adopted in 2021, where one of the main duties of the housing manager is ensuring fulfilment of the requirements set for energy efficiency of the building – she or he is to perform tasks like ensuring measures to meet minimum energy efficiency requirements of the building and the increase of its energy efficiency, supervision of heating and ventilation systems of the building and coordination of the energy certification process of the building.

To perform these duties validly and to achieve the goals set in Latvian development planning documents regarding energy efficiency of buildings, duly educated housing managers are required with competences in energy efficiency and climate change issues, who can organise the implementation of energy efficiency measures and appropriate maintenance of buildings afterwards [17]. At the same time, knowledge in Latvia regarding climate change and energy efficiency in general is assessed as weak (cf. Table 1) and considered one of the risk factors in building management. This can be explained by the fact that previously trainings were more focused on management activities and less on energy efficiency measures.

Polish experts indicate that in order for the manager to be the initiator of modernisation activities in the building, she/he should have knowledge comparable with that of the energy auditor, i.e., knowledge of technical solutions that can be used in the building, be able to assess their energy and economic efficiency, as well as the impact on the quality of life of residents in terms of improving the internal climate. Certainly, one has to keep in mind that the manager can only suggest to the owners the renovation activities needed; the decision is always taken by the owners. Polish experts note that trainings organised by different associations do not or very rarely include the aspect of increasing energy efficiency of buildings. If related issues are examined, it is done in the context of applicable regulations and requirements and not stressing the necessity to take measures for reducing the energy demand [14], [18].

Verband Immobilienverwalter Deutschland (VDIV) in Germany developed a study course *Klimaverwalter* (Climate Administrator) for housing managers to improve their knowledge in energy efficiency measures. German experts emphasise that housing managers must have technical, commercial and legal expertise, as well as key skills on project management, meeting management, facilitation and collaboration. Managers have the responsibility to involve various stakeholders in energy renovation processes and in the decision-making process at an early stage. It is recommended that

property managers have extensive technical and methodological knowledge in order to be able to accompany and support decision-making processes of a homeowners' association. Good networking with energy and funding consultants is also helpful.

In view of the provisions laid down in the legislation, it can be concluded that a competent housing manager can to a large extent influence the decision for building renovation, as well as organise the related processes. Whereas a decision on renovation is taken by the building owners, construction and the required preparatory work and services are performed by respective construction specialists (see Table 3).

Table 3. Opportunities of the Housing Manager to Involve in the Building Renovation Process

Housing managers can:	**Housing managers cannot:**
• inform the building owners on the necessity of measures to increase energy efficiency; • indicate to positive aspects of increasing energy efficiency; • organise technical inspection, energy audit, energy certification; • organise the process of applying for and receiving financing; • organise the construction process for renovating the building.	• take a decision on energy efficiency measures and the application for financing (competence of the building owners); • perform technical inspection, energy audit, energy certification himself/herself (performed by certified specialists); • select the specific technical solutions (performed by construction specialists and agreed with the owners); • perform construction and construction supervision (performed by construction specialists).

When implementing the CLI-MA (From Housing Manager to CLImate MAnager) project, experience and knowledge from Germany VDIV study course *Klimaverwalter* (Climate Administrator) was transferred to Poland and Latvia. In Latvia, the housing manager study programmes "Real Estate Management" and "Civil Construction and Real Estate Management" have been improved, supplementing several study courses with additional materials on different energy efficiency aspects. In Poland, a special study course has been developed available to housing managers in a stationary form and for purchase on an e-learning platform.

5. CONCLUSIONS

The obligation of apartment owners of residential buildings is to ensure the management of commonly owned parts of the building. A professionally organised and implemented housing management process, in general, successfully ensures long-lasting and qualitative operation of the residential complex, which makes it possible not only to maintain the value of the property, but also to increase it.

When administering a real estate, it is required to know the regulatory basis, be competent in engineering, accounting and record keeping, taxes, business planning, fire safety and labour protection issues, as well as in the legal, organisational and communication fields. For managing residential buildings, the state as the legislator, the owners and the housing manager have to develop a sustainable long-term strategy of the building management, including three pillars: economy, urban environment and community. A systemic approach of economic analysis has to be applied in planning, evaluating strengths and weaknesses of different measures and their alternatives,

in order to achieve significant benefits with the smallest resources (investments) possible in the field of building management, education of the involved parties, climate change and introduction of energy efficiency measures.

All three countries have legal regulations in place regarding housing managers and their operation field. In Germany and Poland, these are at a relatively general level and the specific activities are determined by the apartment owners contracting the housing manager. In Latvia, management activities, tasks, competences, responsibilities and qualification requirements are stipulated more comprehensively. Having evaluated the qualification requirements of housing managers, it can be concluded that Latvia has the highest professional qualification requirements to housing managers, as a certain level of professional qualification is required to work as housing manager.

Having researched the policy guidelines, legal regulations and requirements to the professional qualification of housing managers, it can be concluded that in Latvia and Eastern European countries, the housing policy and regulatory enactments are geared towards increasing the energy efficiency of buildings. Recently, the connection of these issues with housing management has become more topical. Up to now, the emphasis in housing management has been on maintaining the technical condition, sanitary cleaning, ensuring public utilities and financial issues. However, the actual situation shows that housing managers are required to also have competences in energy efficiency and climate change issues and be able to organise the implementation of energy efficiency measures. On the other hand, quite often, a lack of such skills and competences negatively affects the living conditions of residents.

The housing manager's skills to administer buildings and communicate with apartment owners play an important role in improving the general condition of the building and its energy efficiency. A competent housing manager is a person who can inform, promote and organise the initiation and implementation of projects to increase the energy efficiency of buildings. The decision to renovate the building is taken by the building owners, while construction and the required preparatory work is performed by respective construction specialists. Coordinated and transparent division and delimitation of tasks and responsibilities is the key.

ACKNOWLEDGEMENTS

The article uses materials from the CLIMA (From Housing Manager to CLImate MAnager) project funded by The European Climate Initiative – EUKI. EUKI is a project financing instrument first provided by the German Federal Ministry for the Environment, Nature Conservation, Nuclear Safety and Consumer Protection (BMUV) and meanwhile located at the Federal Ministry for Economic Affairs and Climate Action (BMWK). The EUKI competition for project ideas is implemented by the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH. It is the overarching goal of the EUKI to foster climate cooperation within the European Union (EU) in order to mitigate greenhouse gas emissions. Agreement number: 81263938, Project processing number: 17.9045.0-002.77. Project duration: 10/2020-03/2023.

REFERENCES

1. Saeima. (2020). *On Latvia's National Development Plan 2021–2027*. Available at https://likumi.lv/ta/id/315879-par-latvijas-nacionalo-attistibas-planu-20212027-gadam-nap2027
2. Cabinet of Ministers. (2023). *Affordable Housing Guidelines 2023–2027*. Regulation No. 739 of 8 November 2023. Available at https://likumi.lv/ta/id/347211-par-majoklu-pieejamibas-pamatnostadnem-20232027-gadam
3. Amoliņa, I. (2022). *Management System of Multi-Apartment Residential Buildings in the Context of Sustainable Conservation*. PhD Thesis. Riga: RTU, 287 p.
4. Opoku, A., Gunthrie, P., & Ahmed, V. (2018). Value for Money and Assets Management in Housing. *Journal of Facilities Management*, *16* (3), 234–237. DOI:10.1108/JFM-07-2018-074
5. Falorca, J.F. (2019). Main Functions for Building Maintenance Management: An Outline Application. *International Journal of Building Pathology and Adaption*, *37* (5), 490–509. DOI:10.1108/IJBPA-08-2018-0067
6. Vijverberg, G. (2004). Strategic housing stock policy and maintenance practice in Dutch social housing. In *CIBW70, 2004 Hong Kong International Symposium*. 7–8 December 2024, Hong Kong.
7. Building, Urban Affairs and Spatial Development. (2022). *Housing Policies in the EU*. Available at https://www.bbsr.bund.de/BBSR/EN/publications/SpecialPublication/2022/housing-policies-in-the-eu-dl-neu.pdf?__blob=publicationFile&v=3
8. Eurostat. (2022). *Type of Housing in Cities or Rural Areas.* Available at https://ec.europa.eu/eurostat/cache/digpub/housing/bloc-1a.html?lang=en
9. Stāmure, I., & Geipele, I. (2017). Development of sustainability of the construction sector in Latvia. In *58th International Scientific Conference of Riga Technical University "Scientific Conference on Economics and Entrepreneurship" (SCEE'2017):* Proceedings, (pp. 41–42). 13–14 October, 2017, Riga, Latvia.
10. Imad, A. (2009). Maintenance Practices in Swedish Industries: Survey Results. *International Journal of Production Economics*, *121* (1), 212–223. DOI:10.1016/j.ijpe.2009.05.005
11. Deokseok Seo, J. P. (2020). Construction Defect and Maintenance Problem of Watering Apparatus and Sanitary Work in Apartment Building. *International Journal of Advanced Science and Technology*, *29* (4s), 949–961. Available at http://sersc.org/journals/index.php/IJAST/article/view/6555
12. Muczynski, A. (2022). Organizational Model of Municipal Housing Stock Management in the Contracting System – A Case Study of Poland. *Land Use Policy*, *115* (C).
13. Clair, A., Reeves, A., Mckee, M., & Stuckler, D. (2018). Constructing a Housing Precariousness Measure for Europe. *Journal of European Social Policy*, *29* (1), 13–28. DOI:10.1177/0958928718768334
14. Rajkiewicz, A. (2021). *Market Research among Facility Managers, Public Bodies and Financing Institutions in Poland regarding the Scope of existing and required Skills of Building Managers on Topics related to Mitigation of Climate Change caused by Buildings*. Available at iwoev.org
15. Geipele, I., Kundziņa, A., Zvirgzdiņš, J., Pļaviņa, B., & Stāmure, I. (2021). *Market Research among Facility Managers, Public Bodies and Financing Institutions in Latvia Regarding the Scope of Existing and Required Skills of Building Managers on Topics Related to Mitigation of Climate Change Caused by Buildings in Latvia*. Available at iwoev.org\

16. Economidou, M. (2017). *Energy Efficiency Upgrades in Multi-Owner Residential Buildings*: *Review of Governance and Legal Issues in 7 EU Member States*, EUR 29094 EN. Luxembourg: Publications Office of the European Union. Available at https://publications.jrc.ec.europa.eu/repository/handle/JRC110289
17. Geipele, I., Kundziņa, A., & Jansons, L. (2021). Methodology for Increasing the Competences of Housing Managers in Climate Change Issues. *Latvian Journal of Physics and Technical Sciences*, *58* (6), 35–45. DOI:10.2478/lpts-2021-0044
18. Rajkiewicz, A., & Popiołek, M. (2021). Building-up skills of real estate managers in Poland in view of European Green Deal. In *Scientific Problems of Engineering Economics of Construction and Real Estate Management, Regional and Territorial Development (ICEREE'2021)*: Book of Abstracts. 30 September 2021, Riga: RTU Press.