

Collaboration Partner Programme

A Partnership on Strategic Property
Intelligence for UK Social Housing

February 2026



Why we're here?

"We're here to explore whether there's a strategic match between your priorities and what we're building with a small group of UK landlords."



- ▶ Understand your strategic context
- ▶ Share what we see across the sector
- ▶ Assess mutual fit – both ways
- ▶ Agree next steps, if alignment exists

UK Social Housing: Has the Old Compliance Model Just Ended



A transformation from reactive crisis management to proactive property intelligence.



The Strategic Inflection Point

Three regulatory timelines converge in UK social housing

<i>Regulation</i>	<i>Deadline</i>	<i>Implication</i>
Awaab's Law Phase 1 in force Oct 2025 Phase 2: 2026-2027	Ongoing enforcement 2026-2027 expansion	Proactive hazard identification required Complaint-driven approach is insufficient
SHF Wave 3 £1.29 billion	Grant spent by March 2028 Delivery to Sept 2028	Measured performance validation expected by funders and auditors
Social Housing MEES (Confirmed Jan 2026)	EPC C on min. 1 metric by 1 April 2030	New HEM methodology Re-rating risk for homes near C-threshold



The Board Question:

"Looking back from 2030, will we be comfortable explaining the choices we made in 2026?"

Q1-Q2 2026: The Strategic Decision Window

Start Q1-Q2 2026	Defer to 2027
24+ months measured data before SHDF deadline	Compressed evidence window Weaker funder documentation
Proactive compliance operational BEFORE peak Awaab's enforcement	Reactive exposure during expanded enforcement
Pre-reform baseline established BEFORE HEM methodology change (Oct 2026)	Concentrated compliance risk in narrow 2028-2030 window
3 budget cycles to phase investment	Emergency capital deployment Limited strategic options

"It's not about investing more – it's about investing at the right time."

The Financial Reality



Conservative 5-Year Exposure: 500-Home Portfolio

Reactive Management Exposure

Risk Category	5-Year Exposure
Awaab's Law: disrepair, remediation	£400K – £2.0M
SHF performance gap (15% on £5M)	£750K
EPC reform: emergency catch-up	£1.5M – £4.0M
TOTAL REACTIVE EXPOSURE	£2.65M – £6.75M*

Strategic Value: Property Intelligence

Strategic Area	5-Year Value
SHF: measured validation	£750K secured
Awaab's: 60% mould reduction	£240K – £1.2M
EPC: emergency spend reduced	£1.5M – £4.0M
Operational efficiency	£125K – £525K
NET STRATEGIC ADVANTAGE	£1.9M – £6.0M

Conservative estimates based on sector benchmarks, KES Project experience, Housing Ombudsman case data, and regulatory compliance scenarios. Validated in your specific context through Phase 1.



Strategic Dialogue

"Before we go further – what resonates with your reality?"

- ▶ Which of these three regulatory tracks matters most to you?
- ▶ How are you currently handling retrofit validation?
- ▶ What has been your experience with digital transformation initiatives?

The Adoption Gap: Sector Reality

70% of digital property management initiatives fail to deliver projected ROI



Operational Bandwidth

Teams already at capacity – 'analyse when you have time' isn't realistic



Skills Gap

Property management expertise \neq data interpretation capability



Integration Friction

'Yet another dashboard' syndrome – new logins, not smoother workflows



Unclear Accountability

Everyone expects someone else to act on data insights

KNAUFENERGY
solutions



*"The question isn't 'does the technology work?'
– it's 'can the organisation adopt it?'"*

What makes this different?



Traditional Vendor	Collaboration Partner
Sells hardware + dashboards	Co-validates measurable outcomes
Deployment	£150K professional services in co-development
Customer debugs	Proven tech + structured adoption support
Vendor-buyer transaction	Peer partnership, symmetric investment
'We have 100 customers'	3-5 selective partnerships in 2026

"The technology is proven. UK regulatory fit is what we validate together."



Proven technology

- ✓ 97% accuracy
UK Gov SMETER-validated
- ✓ 90 years
Knauf building science
- ✓ 50,000+ homes
- ✓ Deployed across EU
- ✓ IEA-EBC Annex 94
International standards

Imagine: Your Board Meeting – December 2027

***What does your board
pack look like 18 months
from now?***



Compliance

- ▶ Proactive Awaab's Law compliance
- ▶ Zero enforcement escalations
- ▶ Defensible audit trail



SHF Assurance

- ▶ 18+ months measured post-retrofit evidence
- ▶ Funders cite you as best practice
- ▶ Wave 4 funding ready



Financial Efficiency

- ▶ Capital allocation optimised with data
- ▶ Maintenance budget reduced
- ▶ Net savings £1.4M-£3.4M



Sector Leadership

- ▶ UK reference landlord
- ▶ Thought leadership platform
- ▶ Conference speaking, case studies

Phase 1: Structured Validation (22-36 weeks)

Your Investment	KES Investment (included)
£199/home (100-500 homes)	£150K professional services
3-5 active users + Director-level sponsor	Dedicated Customer Success Manager
~40 hours team time (2-4 hrs/week)	Use case discovery & configuration, view of integration, training, adoption
Public reference (conditional on Go)	Platform access, dashboards, 24 months

Go/No-Go Decision (Week 22-36) – Based on evidence, not optimism:

- Technical success (Strong data quality)
- Business value (2+ use cases validated, ROI positive)
- Adoption (teams actively using in daily operations)
- Strategic fit (SHDF, Awaab's pathways clear)



If Go:

- Phase 2 deployment
- 20% pricing locked 24 mths
- Advisory Board access



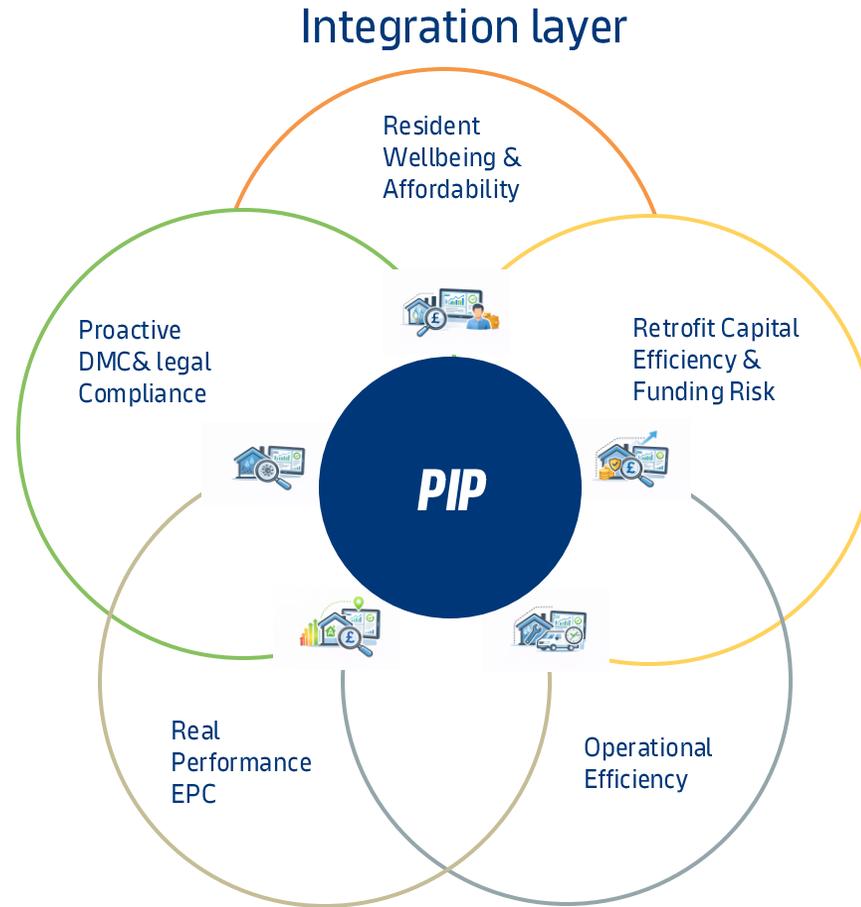
If No-go:

- Professional closure
- Insights Report
- No long-term obligation

Knauf Energy Solutions- Property Intelligence Platform



Holistic central intelligence



Customer Adoption Success model

How We Create Value Together (22-36 weeks)



Decision Gate

Go → Phase 2 Portfolio Deployment | No-Go → Professional Closure

Discovery workshops involve Asset Management, Compliance, Operations and Finance. Dedicated Customer Success Manager drives weekly check-ins throughout Phase 1.



Partnership Works Best When



3-5 selective partnerships in 2026 – mutual qualification



Portfolio
5,000+ homes (min. 100 homes Phase 1)



Strategic Content
Active SHF Wave 3 delivery or Awaab's Law preparation



Budget Timing
Q1-Q2 2026 capital decisions in process



Executive Sponsor
CEO, CFO, Compliance Director or Asset Director



Innovation Mindset
Willingness to adopt evidence-led decision-making



Honest Feedback
Willing to say what works – and what doesn't

"We choose each other."

If strategic alignment exists today, typical next steps would be

Action	Responsible
Exchange relevant data (portfolio, SHF, maintenance)	Partner
Pre-analysis of portfolio and value estimation	KES
Strategic Partnership Workshop – deep dive	Both
Tailored partnership proposal	KES
Presentation of findings + partnership Go/No-Go	Both
Mobilisation (if aligned)	KES

"How would you like to proceed if this resonates?"



Thank you

We hope to collaborate with you

