CLEAR-HP

How the CLEAR-HP project helped to lead the consumer switch to heat pumps

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The CLEAR-HP project helped to accompany consumers across Europe throughout the whole purchasing journey of switching from a fossil fuel boiler to a heat pump. The project aimed to raise consumer awareness, build confidence in heat pump technology, and ultimately enhance both the energy efficiency and comfort of people's homes.

At its core, national consumer organisations in seven European countries (Belgium, Bulgaria, Italy, Slovenia, Slovakia, Spain and Portugal) organised collective purchase campaigns for independently-tested heat pumps. Participants benefited from advantageous purchase and installation packages that included consumer support and workshops throughout the process.

CLEAR-HP achievements in numbers

7
collective purchase campaigns

23,000+
consumers registered for the campaigns

20
heat pumps tested

522
installations triggered

519.56
tons of CO2 emissions reduction equivalent to flying from Sofia to Lisbon over 1,000 times

1.66
GWh/year primary energy savings, equivalent to fully charging an electric vehicle (75 kWh) 22,000 times

59
workshops for consumers organised

€1,661,893
of investments in sustainable energy technologies triggered

22
policy recommendations developed to remove practical barriers for consumers to install a heat pump

Introduction

Consumers across Europe are increasingly interested in switching to renewable heating, but buying a heat pump is still a major investment and can easily feel like a complex journey. Limited knowledge and widespread misperceptions of heat pumps become especially problematic in emergencies, when a boiler breaks down in winter and people rush to replace it with another boiler as it is seen as the easier option. This traps consumers into another 15 to 25 years of fossil fuel dependency and unpredictable energy prices.

Replacing a boiler with a heat pump may often be simpler than expected, but it does require some homework. Getting clear information on heat pumps and support from trusted experts makes the planning and preparation much easier and manageable for consumers and will lead to a positive purchasing experience, savings on energy bills and ultimately to greater comfort in their homes.

CLEAR-HP supported this transition by guiding people through every step of the purchasing process and helping them navigate financial and administrative hurdles.

Alongside this on-the-ground support, national consumer organisations also provided guidance to national governments on what consumers need to feel encouraged and confident to buy their first heat pump. Across all countries, heat pumps often remain out of reach due to high up-front costs, complex and not always accessible financing options, split incentives between owners and tenants, and a shortage of qualified installers. To better understand these challenges, the project partners conducted a comprehensive assessment of national policies and legal frameworks, combined with firsthand consumer insights, experiences, and feedback on financing schemes for heat pump installations. This approach helped identify the key barriers and obstacles hindering consumer adoption of heat pumps and supported the development of relevant proposals to strengthen consumer policies in this area.

Through CLEAR-HP's practical outputs, national consumer organisations are directly contributing to Europe's decarbonisation goals. The consumer uptake of heat pumps is a key driver to achieve these goals.

Collective purchase campaigns: How we went about it and what we learned

What is collective purchasing?

Collective purchasing schemes bring together large groups of consumers, allowing intermediary organisations, such as national consumer organisations, to leverage this combined demand to negotiate more favourable prices and conditions with heat pump suppliers and installers.

The CLEAR-HP project implemented collective purchase campaigns in seven European countries, with the objective of facilitating consumer access to heat pump technologies. Through these initiatives, consumer organisations acted as trusted intermediaries, negotiated offers with suppliers and installers while providing independent information and guidance throughout the purchasing process.

What's in it for the consumer?

- enhance consumer trust
- simplify administrative and technical processes
- secure competitive pricing
- ensure qualified installation

CLEAR-HP's campaign strategy moved beyond offering simple price discounts and focused instead on providing trustworthy, reliable support throughout the entire consumer journey. In practice, this meant that the campaigns helped:

- reduce technical and financial uncertainty through independently tested models
- simplify decision-making via curated, limited product portfolios
- ensure installation quality and after-sales reliability
- deliver transparent, all-inclusive pricing structures

From start to finish: How to set up and carry out a collective purchase campaign

Market research

The market research is the first and most crucial step to ensure that products selected for the testing are reasonably representative of what is available on the national market at the time of the campaign launch.

The market research was complemented by the findings of a market indicators survey to understand the manufacturers' perspective on market trends and a user preferences survey to gather insights from consumers.

The user preference survey collected information about consumers' experiences with and preference for heat pumps. It helped identifying what types of heat pumps are the preferred option in their national context, what are the reasons for installations and what are the decision factors influencing the choice of the heat pump. For example, energy efficiency and cost savings are the main drivers across all countries. In Slovenia, users highlighted energy efficiency (70%) and lower heating costs (56%) as the main reasons. Similarly, in Belgium and Spain the main motivations include improved energy efficiency and the ability to heat and cool the home with one system. Portugal and Italy users also emphasised energy efficiency and comfort as key drivers for installation.

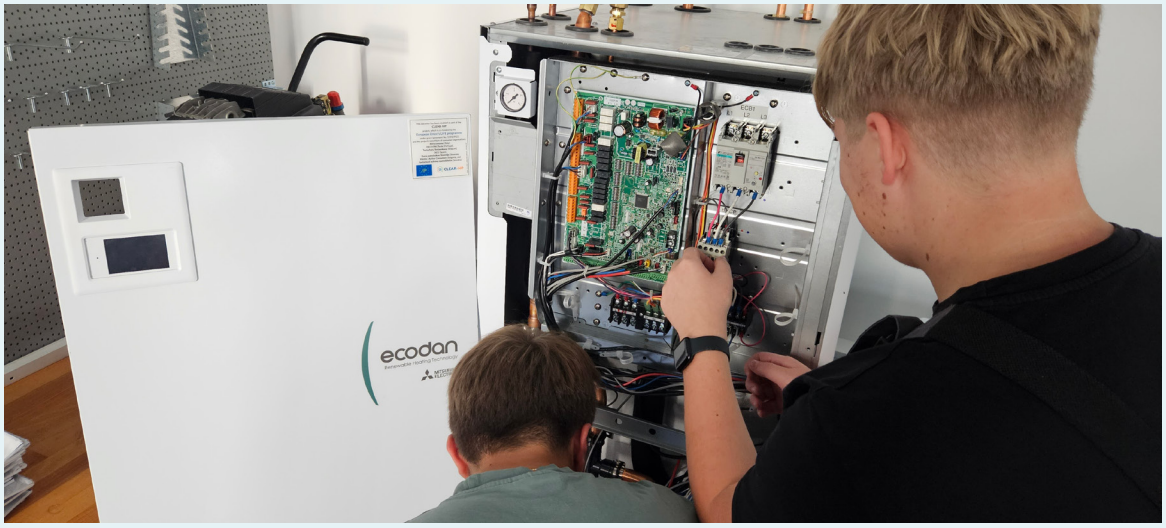
Overall, users in all countries are highly satisfied with their heat pumps, particularly with energy efficiency and comfort. While up-front costs remain a significant barrier, government incentives have helped mitigate these costs in several countries. Moreover, energy savings and environmental benefits were key motivators for adoption, although rising electricity prices and maintenance issues are perceived as concerns.

Product testing

To ensure that consumers get the best products on the market, heat pumps were tested in an independent laboratory. The product testing was led and organised by ICRT (International Consumer Research and Testing). ICRT builds on a history of product testing that reaches back over 50 years and conducted its first air-to-air heat pump test through the first CLEAR project in 2014, and its first air-to-water heat pump test in 2022.

Alongside heating/cooling capacity and energy efficiency ('Coefficient of Performance'), tests were conducted for noise level, ease of installation and use, overall value for money and connectivity. One of the key aspects of ICRT's testing process is that they aim to reflect real consumer use of the product in their testing.

The heat pumps were still functioning after the tests and were therefore donated to a charity or research facility.



Heat pump donated by ZPS, the Slovenian consumer organisation, to support a local school's transition to efficient heating.

Heat pumps donated by SOS, the Slovak consumer organisation, are helping students at the Technical Secondary School in Čadca gain practical experience in the installation, operation, repair, and maintenance of heat pump systems.

Product selection and negotiations with suppliers

Following the market research and product testing, project partners selected the heat pump devices to be offered in their campaigns. A recurring strategic approach was to offer two or three carefully curated models, typically including:

- a top-performing premium option
- a high-quality mid-range alternative
- a more affordable, yet technically robust, entry-level solution

The tiered approach allowed households with different budgets to participate without compromising on quality.

Project partners engaged multiple suppliers and installers (e.g. up to 15 in Italy or 17 in Bulgaria), and negotiated consumer-oriented offers. These advantages included direct percentage discounts (5–20%), fixed installation discounts, preferential unit price reductions, and guaranteed price ranges including installation and system start-up. In addition, the offers also included installation and service guarantees to ensure quality and timely installations.

Campaign launch and promotion

The project partners used a mix of promotion strategies and activities, including mass outreach, targeted engagement through social media, editorial content and explanatory content, workshops and emailing, and educational and advisory offers. The objective was to raise awareness, strengthen trust in heat pump technologies, reduce uncertainties, and help consumers make informed decisions, ultimately encouraging participation in the collective purchase and the switch to heat pumps.

Newsletters and direct email campaigns proved to be the most effective channels to encourage consumers to sign up for the campaigns. Social media (Facebook, Instagram, LinkedIn, X/Twitter, TikTok, YouTube) played a crucial visibility role across countries but generally led to lower conversion rates.

Overall, communication towards consumers is most effective when it is clear, understandable, evidence-based, and tailored to consumers' everyday needs.

Educational outreach

Consumer advice and education were central to building consumer confidence in what is often perceived as a complex technological investment. Through the project partners' comprehensive educational offers, consumers were supported at different stages of their decision-making process during the collective purchase campaigns, from initial consideration to installation and use. National consumer organisations organised 59 workshops and information campaigns to inform 6,500 consumers about everything they needed to know before installing a heat pump. The workshops focused on general information on the energy transition and energy saving tips, to the practicalities of how to make their homes heat pump-ready, how to apply for funds and what to know about the installer's visit. Participants were able to ask questions or share their concerns, which could be immediately addressed by the workshops' experts.

In addition to the workshops, information was also offered through a combination of educational materials, for example, articles in consumer magazine, the creation of a video series hosted by a heat pump expert in Italy or printed brochures and educational booklets (e.g., "From idea to heat pump purchase") distributed at fairs and public events in Slovakia and Slovenia. Several project partners also developed practical decision-support tools to assist consumers in evaluating the feasibility and potential benefits of heat pump adoption, including home-readiness guidance and preparation checklists, product comparison tools based on independent testing results (e.g., OCU's heat pump comparison webpage, Altroconsumo's heat pump comparison webpage), operational cost calculators for heat pump systems (e.g. S.O.S.'s heat pump cost calculator and step-by-step participation guides for the collective purchase campaign process.

How to engage consumers on complex technical topics such as heat pumps?

CLEAR-HP'S lessons learned from the workshops:

1. Start with simple, general information and gradually move towards more technical details and practical aspects. For example, begin with a basic explanation of what a heat pump is before addressing finance options and installation steps.
2. Avoid a one-size-fits all approach and adapt communication channels to the national context and consumer groups. For example, newsletters may work well in one country, while printed brochures are more effective in another.
3. Monitor engagement and conversion rate and adjust strategies in real time. For example, if a newsletter sent at 09:00 performs poorly, test alternative timings or formats.
4. Use expert-led and interactive formats for the workshops. For example, organise workshops and Q&A sessions with installers or energy advisors.
5. Ensure sufficient time for questions to address consumer concerns and questions. For example, Q&A elements in the sessions and provide follow-up support channels.
6. Integrate real consumer testimonials to enhance credibility. For example, invite a consumer who can share experiences with using a heat pump.
7. Make educational materials, practical decision-support tools and workshop recordings available on the respective website. For example, CLEAR-HP partners' materials can be found in the respective languages for all consumers to access (see links to the websites).

Purchase and installation

The purchase and installation process demonstrates how consumer organisations can act as effective market facilitators and trusted intermediaries in accelerating the uptake of clean heating technologies. The implementation confirms that this model can generate substantial consumer interest and improve access to high-quality heat pump solutions, while also highlighting practical delivery challenges. For instance, Italy and Spain experienced a significant drop-off between initial interest and completed installations due to technical constraints and costs, while Portugal and Belgium faced delays linked to installer responsiveness and pricing competitiveness. By contrast, experiences in Slovenia and Bulgaria underline the importance of clear offer design and strong installer coverage to support implementation. In Slovakia, a workshop for installers proved very useful. Organised by the project partners, it focused on improving the communication with consumers, both when presenting the offer and during home visits. Follow up advice was provided to consumers, who experienced problems with HP installation on both sides – to consumers but also to installers.

Overall, the results show that while consumer led schemes are effective in mobilising demand and building trust, their success depends on simplified user journeys, availability of public support and sufficient installer capacity to convert interest into installations.

Photos of installation

Air-to-water heat pump installed in a Slovak consumer's home as part of the CLEAR-HP initiative.

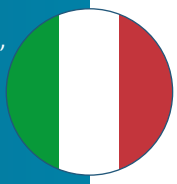
Consumers' feedback

As part of the campaigns, the project partners carried out satisfaction surveys to gather insights into consumers' experiences and the satisfaction level throughout the journey.

Among those who registered for the campaign and completed a heat pump installation, satisfaction levels were consistently high. Consumers highlighted improved comfort, reliable and good performance of the heat pumps, and the professionalism of installers. Reported negative experiences were limited and mainly related to pricing concerns or procedural delays rather than the performance of the technology itself.

ITALY

Consumers who took part in both the workshops and the collective purchase campaign, found that overall the experience was very positive. "The workshops were a valuable starting point, as they helped me better understand how heat pumps work and what their practical benefits are. The information provided was clear and comprehensive, making the technology much easier to grasp".



Consumers reported that the collective purchase campaign itself was an excellent initiative, as it not only raised awareness on the topic but also made the purchasing process more accessible. "Joining the purchasing group through Altroconsumo allowed me to benefit from more favourable conditions compared to other quotes I had received for the same brand, which made a real difference in my decision".

"Altogether, the combination of the workshops and the purchasing initiative gave me the confidence to move forward with the installation. In the end, I decided to install a hybrid heat pump system, and the entire process—from information to decision—felt well supported and worthwhile."

PORTUGAL

"The process was extremely simple. I registered for the campaign and as soon as the offer became available, I sent a visit request to the five installers covered by my zip code. The visits were scheduled very conveniently, always according to my availability, and all installers arrived at the agreed time.

After the visits, it only took two or three days to receive the quotes by email. As the prices of the equipment recommended and tested by DECO PROteste were the same for all Mitsubishi installers, my decision was ultimately based on other details, namely aesthetic, because I didn't want visible ducts in the room. On the agreed day for installation, everything went smoothly. The team arrived in the morning and by early afternoon everything was ready and left the room clean.

I am pleased with the result. Not only does the equipment have an elegant design, but it is also extremely quiet. I am happy I managed to get everything done just before the heatwave. So, it was an excellent experience.

SLOVENIA

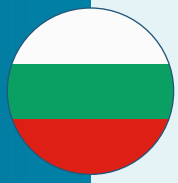
"After joining a collective purchase campaign organised by ZPS, I decided to proceed with the installation of a heat pump through the selected contractor, Stagoj. The process was generally smooth, although there was a delay due to issues with the electricity provider regarding the required power upgrade.

Despite this, the installation itself was completed successfully. Throughout the process, the communication was clear and consistent, and the installer proved to be both professional and approachable, which made the experience reassuring.

Overall, I am very satisfied with the result. The group purchasing scheme played an important role in making the technology more accessible and helped me move forward with confidence. The guidance provided along the way was also very valuable, supporting me from the initial decision through to the final installation."

BULGARIA

Based on feedback from the Bulgarian collective purchase campaign, consumers who proceeded with the installation generally reported a very positive experience. A large majority confirmed that "everything worked well" and that the installation was completed within a reasonable timeframe, while over half expressed a high level of overall satisfaction with the campaign.



Consumers also highlighted the clear practical and financial benefits of participating in the group purchase. One described it as "a very good initiative, with a significant price reduction", while another emphasised that it was "very useful and with good prospects for Bulgarian consumers". Overall, these experiences show that for those who moved forward, the campaign delivered a smooth installation process, favourable purchasing conditions, and a positive and reassuring experience with the collective purchase model.

SLOVAKIA

Consumers highlighted several benefits of the collective purchase campaign. One emphasised the value of the complete package, noting that "the great benefit of the campaign was the whole package for the heat pump, including installation and subsidy administration", and adding that after the first winter "we consumed more than half less electricity compared to before". Another consumer was pleasantly surprised by the design, explaining that "the outdoor unit is very elegant and fits well with my garden". A third initially had concerns about noise, as the unit was installed just under the bedroom window, but reassured that "we can't hear it at all".

BELGIUM

Feedback from participants in the Belgian collective purchase campaign was largely positive, with many highlighting the clarity and support they received throughout the process. One participant noted that "the information provided during the webinars really helped me understand whether I was ready to adopt a heat pump", reflecting how the guidance offered helped consumers make informed decisions.

Participants also reported increased confidence, particularly thanks to the support mechanisms in place. Several valued the reassurance of knowing they could receive assistance in case of issues with the supplier, which made the overall experience feel more secure and reliable.

See what a Belgian consumer has to say about making the switch to sustainable and clean technology! Click on the videos below.

Key takeaways from the campaigns

A well-functioning market for heat pumps builds on **clear and accessible economic information** that allows consumers to make informed decisions. Campaign experience shows that consumers respond positively when the financial offer is transparent and supported by practical tools. In several countries, project partners developed **operational cost calculators, product comparison tools and simple payback simulations** to help households understand long-term savings and efficiency gains. Similarly, offering **all-inclusive pricing structures negotiated with installers** helped reduce uncertainty and strengthened trust in the investment.

To be avoided

- unclear or incomplete pricing (e.g. excluding installation or hidden costs)
- communication focused only on upfront cost without explaining long-term savings
- competing schemes that distort price signals (e.g. "free" but lower-quality offers)

A **stable and predictable policy framework** is equally essential to support consumer uptake. Where national schemes were clear and aligned with market initiatives, uptake conditions improved. For example, combining **VAT reductions or subsidy schemes with clear communication and timing of campaigns** helped make heat pumps more affordable and easier to access. In countries where procedures were simplified or support made more visible to consumers, confidence in the transition increased.

To be avoided

- frequent changes or interruptions in subsidy schemes
- complex or slow administrative procedures discouraging applications
- misalignment between campaign timing and availability of public support

Translating consumer interest into installations requires **structured guidance and personalised support throughout the journey**. The campaigns demonstrated that information alone is not sufficient: uptake increases when awareness-raising is complemented by **workshops, technical pre-assessments, and step-by-step guidance materials**. For instance, several partners provided **home-readiness tools, expert-led workshops and follow-up advice**, enabling consumers to better assess feasibility and move forward with installation decisions.

To be avoided

- one-size-fits-all communication that does not reflect different housing situations
- lack of follow-up after initial engagement
- insufficient access to tailored technical advice or installer interaction

Finally, a collective purchase campaign depends on a **smooth, consumer-friendly purchasing journey**, where each step is clearly structured and easy to navigate. Positive examples from the campaigns include **curated product portfolios (2–3 tested models), simplified decision pathways, and coordinated support from consumer organisations acting as intermediaries**. Ensuring **quality installation, clear timelines and responsive installers** proved critical to converting interest into completed installations.

To be avoided

- complex digital interfaces that require repeated data entry or overly detailed questionnaires
- fragmented processes between information, purchase and installation stages
- limited installer capacity or weak coordination with suppliers during the campaign's implementation phase

Consumers are getting ready – policy needs to follow

Based on a comprehensive assessment of national policies and first-hand insights into consumers' experiences on how to accelerate heat pump adoption, CLEAR-HP proposed a **policy roadmap** to improve conditions for a faster transition to heat pumps. These recommendations – for both European and national-level policymakers – take account of barriers that partners observed during the project, mainly due to changes in national policies. This meant that subsidies, for example, were paused or stopped completely in some countries, creating uncertainty for consumers.

- **MAKE** the electricity for heating more affordable by reviewing all fiscal tools and identifying areas where reductions or exemptions can be implemented.
- **PROMOTE** instruments and services to reduce consumption and energy bills such as smart meters, dynamic price offers and energy efficiency measures
- **BRING** predictable and sufficient subsidies and public loans with low or zero interest, mainly for low-income households.
- **CREATE** innovative financial schemes to allow consumers to invest in heat pumps with banks, electricity suppliers, heat pump suppliers and energy performance contractors.
- **BOOST** the qualification and trustworthiness of installers through regular training and public registries listing all qualified installers.
- **HELP** consumers in feeling comfortable with investing in heat pumps through clear communication from their governments and accessible information about heat pump installations through one-stop-shops.
- **PROTECT** consumers by ensuring access to Alternative Dispute Resolution mechanisms in heat pump installations in case things go wrong.
- **GIVE** residents of multi-apartment buildings a real chance to switch to heat pumps.

National policy wins during the project

While the overall progress on the suggested policies (see above) has been slow, the engagement of national consumer organisations has helped deliver some improvements in the right direction. Since the beginning of the project, the consumer journey has improved in:

BELGIUM	Consumers can now benefit from two key measures that lower both the operating and up-front costs of heat pumps. In July 2025, the Belgian Government confirmed a tax shift that reduced levies on electricity and increased them on gas and heating oil, making electric heating (including heat pumps) cheaper to operate and fossil fuel-powered heating more expensive. At the same time, VAT on fossil fuel boilers was raised from 6% to 21%, while VAT on heat pumps was cut from 21% to 6% for new and recent homes (less than 10 years old).
BULGARIA	Progress is underway. The Bulgarian National Association of Active Consumers has contributed to the draft National Social Climate Plan, which is still awaiting approval. The draft plan includes measures to better target financial support for energy renovations. For example, full grants (100%) for multi-unit buildings would be reserved for energy-poor households, and funding would prioritise those with the lower energy performance classes (E, F, and G).
ITALY	Since 2026, consumers have access to the long-awaited subsidy scheme 'Conto Termico 3.0', which allows consumers to recover up to 65% of eligible expenses on energy efficiency and clean heating upgrades in private households.
SLOVAKIA	The Slovak subsidy scheme 'Zelená solidarita', introduced in 2024, provides specific support for low-income households. It covers up to 90% of eligible costs for purchasing and installing PV panels, solar collectors, or biomass boilers. Support for heat pumps is still only available under the regular subsidy scheme, which was suspended after the funds were quickly exhausted, but SOS activities lead to improvement of the condition of consumers in regards of their position in the process of subsidy application and repayment, which should be effective onwards.
SLOVENIA	Slovenia's network tariff reform has introduced time blocks and seasonal differences based on grid load, which has made electricity use more expensive for heat pump users. The proposal by Slovenia's consumer organisation ZPS to amend the regulation – allowing consumers to change their billing power, determined by the DSO once a year, free of charge – was successfully adopted and can help reduce the cost impact of the network tariffs.
SPAIN	Air-to-water heat pumps for residential use have become more accessible and affordable thanks to local tax incentives, simplified administrative procedures and grants (especially when combined with solar PV), recognition of a 'self-consumption manager', and clearer information for consumers.
PORTUGAL	The Government announced the launch of a new public low-interest loan in 2026 to support energy efficiency improvements in residential buildings, targeting middle-class households. The initiative follows DECO PROteste's recommendations to create financial incentives for this group. This loan is expected to cover retrofit works such as window replacement, insulation, heat pumps, solar panels, and water efficiency upgrades.

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