



RISE

Retrofit information,
support & expertise

Comparing Housing Stock Assessment Software

Quick guide

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Introduction

Being confident that your retrofit programme is based on accurate and consolidated data is crucial when ensuring the success of its delivery, monitoring and evaluation.

There are a number of software platforms that can house, analyse, and model retrofit scenarios based on reaching various targets for your housing stock, and this quick guide aims to inform on the capability of a few examples of these software platforms.

This publication aims to share insights, good practices, and lessons learned from relevant retrofit, sustainability and warm homes projects. It is intended for informational purposes only and does not constitute recommendations or endorsements of specific suppliers, products, or services within the sector.

Software functions

This type of software should:

- House all your domestic property energy efficiency data, and organise it based on a unique property reference number (UPRN)
- Provide summary results (EPC rating, carbon emissions, archetype, fuel bills etc)
- Allow you to model retrofit scenarios

You may have specific requirements from your software, such as:

- Speedy results
- Being able to set multiple targets
- Being able to model specific measures
- A user-friendly interface/summary report for your wider team

Examples of the software

The following software platforms are among the most commonly used by housing providers:

- Portfolio, owned by CoreLogic
- DREam, owned by IRT
- Intelligent Energy, owned by Sava

These platforms all contain housing stock assessment tools that aim to help landlords, local authorities, and registered providers of social housing analyse their housing stock data, and design their retrofit programmes.

This kind of software allows providers to model scenarios based on a variety of targets (including carbon reduction, EPC improvement, heat demand improvement), centralising stock and project data to support informed retrofit decisions.

How they compare

There are several differences across each example software. Some examples are detailed below:

	Portfolio	DREam	Intelligent Energy
User interface	Possible training required to understand how to use, however summary report is very informative and visually appealing	Easy to navigate and visually appealing summary report (Power BI license required to access this)	Easy to navigate and visually appealing summary report
Speed	Can take a few days for scenarios to run	Scenarios run overnight	Scenarios run same day
Measure options	Largest number of measure options	Limited number of measure options	Good number of measure options
Target options	Can run a number of targets concurrently	This software works slightly differently in that all measures are implemented in a chosen order, and then measure results can be filtered based on achieving various targets (e.g. EPC C). For two targets to be run concurrently, this would need to be done manually	Can run more than one target concurrently for an added fee
Retrofit costs	Option to add custom costs (based on m ² values etc) or use Portfolio's default costs	Option to add custom costs (based on m ² values etc) or use DREam's default costs	Option to add custom costs (based on archetype) or use Intelligent Energy's default costs

	Portfolio	DREam	Intelligent Energy
Updates	Relies on data being provided to the software platform	Relies on data being provided to the software platform	Automated updates possible, where assessment management systems are integrated

Conclusion

Choosing the right housing stock data software depends on how you intend to use it. You should think about:

- Your energy efficiency goals
- The size and type of your stock
- The complexity of your retrofit requirements
- Your staff and finance resources available to purchase the system and maintain the data quality

Links to other resources you may find useful:

- [Property and Household Identification Data Sources](#)
- [Gathering Quality Data](#)
- [Data for Retrofit Projects Toolkit](#)



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