InterFlex

Unlocking the barriers to accelerate and scale up residential flexibility in Belgium

(H)EMS Architecture Evaluation Framework

Guidelines and Market Evaluation for Home Energy Management Systems in the Belgian energy landscape

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Executive Summary

The energy transition is fundamentally reshaping how residential buildings interact with the electricity grid. As households increasingly adopt distributed energy resources such as solar photovoltaic systems, battery storage, electric vehicles, and heat pumps, the need for intelligent coordination of these assets becomes paramount. The Home Energy Management System (HEMS) emerges as the critical enabler of this coordination, serving as the interface between residential flexibility and the broader energy system.

This report presents a comprehensive evaluation framework for Home Energy Management Systems (HEMS) designed to support the scale-up of residential flexibility in Belgium and the broader European market. As the energy transition accelerates, the residential sector is increasingly called upon to provide flexibility services to the grid through intelligent management of distributed energy resources such as electric vehicles, heat pumps, battery storage systems, and smart appliances. The HEMS serves as critical infrastructure enabling this transformation, acting as the orchestration layer between household energy assets, user preferences, and external signals from grid operators or flexibility aggregators.

The framework addresses three fundamental concerns for successful residential flexibility deployment. First, reliability and security: ensuring HEMS platforms meet baseline cybersecurity and data protection requirements appropriate for systems that will increasingly influence critical energy infrastructure. Second, demand response readiness: evaluating whether current systems can support automated flexibility services essential as variable renewable energy penetration increases. Third, user transparency: guaranteeing that end-users maintain meaningful insight into and control over both their energy data and operational decisions affecting their assets.

This report provides minimum requirements, graduated scoring criteria for comparative evaluation, design guidelines for future-proof systems, and detailed market analysis of prominent platforms available in the Belgian market. Key findings indicate that while no single HEMS currently meets all requirements for fully automated residential demand response participation, open-source platforms demonstrate the highest flexibility and capability scores, though commercial solutions are rapidly improving their energy management features.

Key Contributions of This Report:

1. **Evaluation Framework**: A structured methodology for assessing HEMS platforms across six weighted categories, enabling objective comparison between different solutions and identification of capability gaps.

2. **Minimum Requirements Specification**: A baseline checklist of security, functionality, and interoperability requirements that any HEMS deployed in Belgium for flexibility purposes should meet.
3. **Design Guidelines**: Forward-looking recommendations for HEMS developers to ensure their systems can participate in future demand response programs and flexibility markets.
4. **Market Analysis**: Detailed evaluation of the most popular HEMS platforms currently available in the Belgian and European market, with specific attention to Belgian integration capabilities.
5. **Policy Recommendations**: Clear, concise messages to policy makers on how to approach and stimulate the developing field of HEMS platforms.

Principal Findings:

- No single HEMS platform currently available fully satisfies all requirements for automated residential demand response participation, though several platforms demonstrate strong capabilities in specific areas.
- Open-source platforms, particularly Home Assistant, offer the most comprehensive feature sets and flexibility, but require significant technical expertise for deployment and maintenance.
- Belgian-specific requirements, including capacity tariff optimization and Fluvius P1 port integration, are increasingly well-supported but often require manual configuration.
- The annual energy overhead of a typical HEMS installation (55-80 kWh) is substantially offset by optimization savings (300-1000 kWh), resulting in a positive return on investment within the first year of operation.
- The emergence of standards such as Matter 1.4+ and EEBUS, combined with regulatory developments at the EU level, suggests significant improvements in interoperability and DR-readiness over the coming years.

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1. Introduction and Scope

1.1 The Evolving Role of HEMS in the Energy Transition

The European energy system is undergoing a fundamental transformation driven by the urgent need to decarbonize electricity generation while maintaining grid stability and affordability. The large-scale integration of variable renewable energy sources, particularly wind and solar photovoltaics, introduces unprecedented challenges for grid operators who must continuously balance electricity supply and demand [1]. Unlike conventional dispatchable generation, renewable output fluctuates according to weather conditions rather than consumption patterns, creating periods of both surplus and deficit that must be managed through flexibility resources.

Traditionally, flexibility has been provided primarily by large-scale generation assets and industrial consumers capable of adjusting their consumption in response to grid signals. However, the electrification of heating through heat pumps and transportation through electric vehicles is dramatically increasing residential electricity consumption while simultaneously creating new sources of flexibility at the household level [2]. A modern home equipped with a heat pump, electric vehicle, battery storage, and smart appliances represents a significant flexible load that can be shifted in time without compromising occupant comfort, provided appropriate management systems are in place.

The Home Energy Management System emerges as the essential technology enabling this residential flexibility potential to be realized. A HEMS can be understood as an intelligent system that monitors, controls, and optimizes energy flows within a residential building, coordinating the operation of multiple energy-consuming and energy-producing devices to achieve objectives such as minimizing costs, maximizing self-consumption of locally generated renewable energy, or responding to external flexibility requests [3]. The HEMS serves multiple stakeholders: it helps households reduce their energy bills and environmental footprint, assists grid operators in maintaining system balance, and enables new business models for aggregators and energy service providers.

1.2 Current Market Challenges

Despite the clear need for sophisticated residential energy management, the current HEMS market presents significant challenges for consumers, installers, and flexibility service providers alike. The market has evolved organically from multiple directions: home automation systems have gradually added energy features, solar inverter manufacturers have developed monitoring and control capabilities, smart thermostat providers have expanded into broader energy management, and dedicated energy monitoring companies have emerged [4]. This diverse heritage has resulted in a fragmented landscape characterized by proprietary protocols, closed ecosystems, and limited interoperability.

For end-users, this fragmentation means that choosing a HEMS often locks them into a particular manufacturer's ecosystem, limiting their ability to integrate devices from other vendors or switch to alternative service providers. For flexibility aggregators seeking to access residential flexibility at scale, the lack of standardized interfaces means developing custom integrations for each HEMS platform, dramatically increasing costs and complexity. For grid operators and policymakers, the absence of clear standards and minimum requirements makes it difficult to ensure that residential flexibility can be reliably called upon when needed.

Furthermore, many existing systems lack the transparency that users need to understand and trust automated energy management. When a HEMS decides to delay charging an electric vehicle or reduce heat pump output, users must be able to understand why this decision was made, what data informed it, and how to override it if necessary. Without such transparency, user acceptance of automated flexibility remains limited, constraining the potential contribution of residential resources to grid stability.

1.3 Scope and Objectives

This report develops an evaluation framework specifically designed to assess HEMS platforms for their suitability in enabling residential flexibility at scale, with particular attention to the Belgian market context. The framework addresses both current capabilities and future readiness, recognizing that the regulatory and technical landscape for residential flexibility is rapidly evolving.

The specific objectives are threefold. First, to establish minimum requirements that any HEMS should meet to be considered reliable, secure, and suitable for residential flexibility applications. Second, to define graduated scoring criteria enabling comparative evaluation of different platforms across dimensions critical for flexibility deployment. Third, to apply this framework to prominent HEMS platforms available in the Belgian market, providing actionable guidance for stakeholders seeking to select or develop appropriate solutions.

The framework focuses on residential applications in single-family homes and apartments, though many findings are applicable to small commercial buildings. Industrial energy management systems, while sharing some characteristics, operate under different constraints and requirements that place them outside this scope.

2. State-of-the-Art Review

2.1 HEMS Architecture Fundamentals

A Home Energy Management System typically comprises both hardware and software components working together to monitor energy flows, communicate with devices, execute optimization logic, and present information to users [3]. Understanding these architectural elements is essential for evaluating system capabilities and limitations.

The hardware layer includes the central processing unit, which may be a dedicated hub, a general-purpose computer such as a Raspberry Pi, or functionality embedded within another device such as a solar inverter, in which case the (post) processing of data is often done in the “cloud” (the manufacturers server). This central unit connects to various sensors and actuators through communication interfaces supporting protocols such as Zigbee, Z-Wave, WiFi, or wired connections. Smart meter interfaces, typically connecting to the P1 port on European digital meters, provide whole-house consumption and production data. Additional current transformers or sub-meters may provide circuit-level or device-level measurement granularity [5].

The software layer encompasses data collection and storage, optimization algorithms, user interfaces, and integration APIs. Data collection aggregates measurements from connected devices and external sources such as weather forecasts or electricity prices. Optimization algorithms, ranging from simple rule-based logic to sophisticated predictive control using machine learning, determine optimal device setpoints. User interfaces, typically mobile applications or web dashboards, present information and accept user input. Integration APIs enable connection with external services including energy retailers, flexibility aggregators, and other smart home platforms [6].

HEMS architectures can be categorized by their processing location. Local-first systems perform all core functionality on-premise, using cloud services only for optional enhanced features. Cloud-dependent systems require internet connectivity for basic operation, with the central hub serving primarily as a communication gateway. Hybrid architectures balance local processing for time-critical functions with cloud-based analytics and optimization. Each approach presents different trade-offs regarding latency, reliability, privacy, and feature sophistication that must be considered when evaluating suitability for flexibility applications [7].

2.2 Communication Standards and Protocols

The ability of a HEMS to integrate diverse devices and communicate with external parties depends critically on the communication standards it supports. The landscape of relevant standards can be organized into device communication protocols, energy-specific protocols, and demand response standards.

2.2.1 Device Communication Protocols

At the device level, several wireless protocols compete for adoption in the smart home market. Zigbee, based on the IEEE 802.15.4 standard, provides a low-power mesh networking capability widely used for sensors, switches, and lighting [8]. Z-Wave offers similar mesh networking with a focus on reliability and interoperability within its certified ecosystem. WiFi provides high bandwidth suitable for devices requiring substantial data transfer but at higher power consumption. Thread, a relatively newer protocol also based on IEEE 802.15.4, offers IPv6-native mesh networking designed specifically for low-power IoT devices and serves as one of the transport layers for the Matter standard [9].

The Matter standard, developed by the Connectivity Standards Alliance with participation from major technology companies including Apple, Google, Amazon, and Samsung, represents a significant effort to address smart home fragmentation [10]. Matter defines a common application layer enabling devices from different manufacturers to interoperate regardless of the underlying transport protocol. Critically for energy management, Matter version 1.3 released in May 2024 introduced energy reporting capabilities and support for electric vehicle charging equipment, while version 1.4 released in November 2024 added support for solar panels, batteries, heat pumps, and water heaters [11]. This evolution positions Matter as an increasingly important standard for HEMS interoperability.

2.2.2 Energy-Specific Protocols

Beyond general-purpose smart home protocols, several standards address specifically energy management communication. The EEBUS standard, developed by the EEBUS Initiative based in Germany, provides a communication framework enabling energy-relevant devices to exchange information about their consumption, production, and flexibility [12]. EEBUS defines use cases for scenarios including self-consumption optimization, grid-supportive operation, and coordination between devices such as heat pumps and electric vehicle chargers. The standard has achieved significant adoption among German heating and automotive manufacturers, with companies including Vaillant, Viessmann, Audi, and Porsche implementing EEBUS interfaces in their products [13].

The SG Ready standard provides a simpler approach specifically for heat pump control, defining four operating states that can be signaled through relay contacts: normal operation, enhanced operation recommended, enhanced operation required, and reduced operation required [14]. While less sophisticated than EEBUS, SG Ready's simplicity has enabled widespread adoption and provides a baseline capability for heat pump integration into energy management systems. Many modern heat pumps support both SG Ready for basic integration and EEBUS for advanced optimization.

Smart-Grid-bedrijfsmodus	SG0 (X1A/1+2)	SG1 (X1A/3+4)
Normaal bedrijf/Vrij bedrijf GEEN Smart-Grid-toepassing	Openen	Openen
Aanbevolen AAN Energiebuffering in de warmtapwatertank en/of de kamer, MET vermogenbeperking.	Gesloten	Openen
Gedwongen UIT Uitschakeling van de buitenunit en van de werking van de elektrische verwarmingstoestellen wanneer hoge energietarieven.	Openen	Gesloten
Gedwongen AAN Energiebuffering in de warmtapwatertank en/of de kamer, ZONDER vermogenbeperking.	Gesloten	Gesloten

Figure 1: the four operating levels provided by the SGR interface

For solar inverters and battery systems, the SunSpec Alliance has developed standardized information models enabling interoperability across manufacturers [15]. SunSpec models, typically communicated via Modbus TCP, define standard register mappings for parameters including power output, energy production, battery state of charge, and control setpoints. Support for SunSpec significantly simplifies HEMS integration with photovoltaic and storage systems.

2.2.3 Demand Response Standards

At the interface between buildings and grid operators or aggregators, demand response standards define how flexibility requests and responses are communicated. OpenADR (Open Automated Demand Response), originally developed at Lawrence Berkeley National Laboratory and now managed by the OpenADR Alliance, provides a standardized information model for communicating demand response signals [16]. The standard defines Virtual Top Nodes (VTNs), typically operated by utilities or aggregators, which send signals to Virtual End Nodes (VENs) at customer premises. OpenADR was recognized as an international standard (IEC 62746-10-1) in 2019 and is seeing growing adoption in Europe, particularly for electric vehicle charging applications [17].

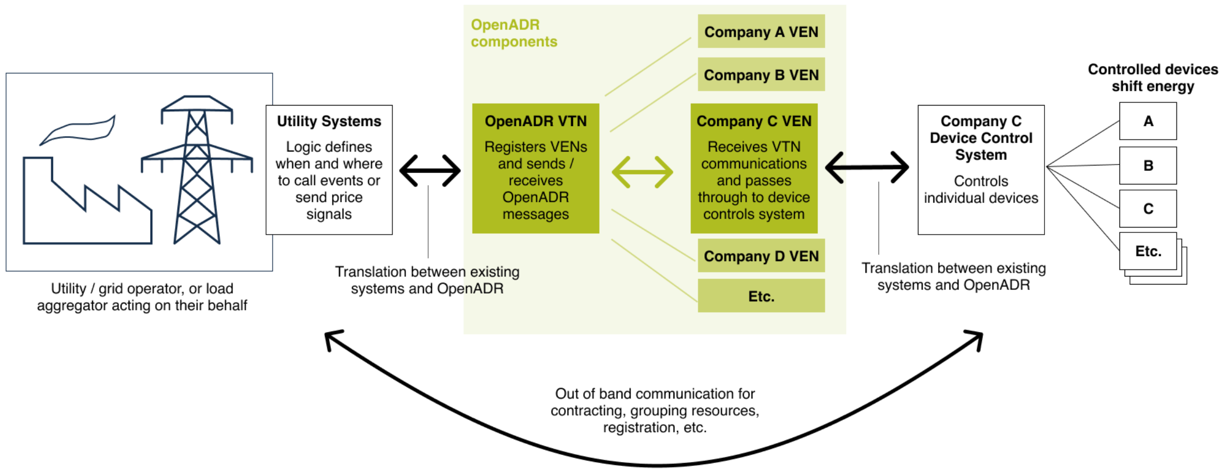

Figure 2: Typical components of a OpenADR load shifting program

The IEEE 2030.5 standard, also known as Smart Energy Profile 2.0, provides an alternative approach with broader scope including pricing, messaging, and distributed energy resource management [18]. While more common in North American deployments, IEEE 2030.5 concepts influence European developments. The forthcoming EU Network Code on Demand Response, expected to take effect from 2027, will establish requirements for demand-side participation in wholesale electricity markets and may drive convergence toward common standards [19].

2.3 Security and Privacy Framework

As HEMS become more sophisticated and interconnected, security and privacy considerations take on critical importance. A compromised energy management system could enable unauthorized access to household data, manipulation of energy-consuming devices, or even coordinated attacks affecting grid stability if deployed at scale [20].

The ETSI EN 303 645 standard, first published in 2020 and updated to version 3.1.3 in September 2024, establishes baseline cybersecurity requirements for consumer IoT devices including smart home and energy management equipment [21]. The standard defines thirteen provision categories addressing fundamental security principles. These include prohibiting universal default passwords, requiring a mechanism for reporting vulnerabilities, mandating secure software update capabilities, ensuring secure storage of sensitive parameters, requiring encrypted communications, minimizing exposed attack surfaces, ensuring software integrity, protecting personal data, maintaining resilience to outages, examining telemetry data for anomalies, facilitating deletion of personal data, simplifying installation and maintenance, and validating input data [22].

Compliance with ETSI EN 303 645 provides a meaningful baseline but does not address all concerns relevant to energy management systems. The data protection provision within the standard aligns with General Data Protection Regulation requirements, recognizing that energy consumption data constitutes personal data revealing information about household activities and occupancy patterns [23]. HEMS operators must therefore ensure lawful basis for data processing, implement appropriate security measures, enable data subject rights including access and deletion, and carefully manage any data sharing with third parties such as aggregators or grid operators.

The choice between local and cloud processing has significant privacy implications. Local-first architectures that process sensitive data on-premise and share only aggregated or anonymized information with cloud services inherently provide stronger privacy protection than cloud-dependent systems that transmit detailed consumption data for remote processing [24]. As flexibility services mature, solutions enabling privacy-preserving participation—where households can offer flexibility without revealing detailed consumption patterns—will likely become increasingly important.

3. Belgian Market Context

3.1 Smart Meter Infrastructure

Belgium's smart meter deployment provides the foundational infrastructure for residential energy management. The Flemish distribution system operator Fluvius has rolled out digital meters across the region, with installation mandatory for all residential connections by January 2025 [25]. These meters, compliant with the Dutch Smart Meter Requirements (DSMR) version 5.0.2, provide standardized interfaces enabling third-party access to consumption data.

Some Fluvius digital meter includes two user ports accessible to consumers. The P1 port, formally designated as the "user port for consumption information," provides formatted data including cumulative energy consumption and injection values, instantaneous power measurements, voltage and current readings, and power quality indicators [26]. Data is transmitted approximately once per second using a serial RS422 interface with RJ12 connector, enabling near-real-time monitoring of household energy flows. The S1 port provides raw high-frequency data suitable for advanced applications such as non-intrusive load monitoring, but is less commonly used for standard HEMS applications and is being phased out on newer meters.

Importantly, the P1 port is disabled by default on Fluvius meters for privacy and security reasons. Users must explicitly activate the port through the Fluvius online portal before any third-party device can access meter data [27]. This activation requirement represents a deliberate design choice placing users in control of their data, though it also creates a friction point that may limit adoption of energy management technologies among less technically engaged households.

The situation differs across Belgian regions. In the Brussels Capital Region, network operator Sibelga provides digital meters with P1 ports activated by default, reducing barriers to HEMS adoption [28]. In Wallonia, network operators Ores and Resa require users to request P1 activation, with Ores charging a €25 processing fee and Resa charging €31-50 depending on circumstances [29]. These regional differences create complexity for HEMS providers and consumers navigating the Belgian market.

3.2 The Capacity Tariff

The introduction of the capacity tariff (capaciteitstarief) in Flanders from January 1, 2023 fundamentally changed the economic incentives for residential energy management, creating strong motivation for peak demand reduction and load shifting [30]. Understanding this tariff structure is essential for evaluating HEMS value propositions in the Belgian context.

Under the traditional volumetric tariff structure, network costs were recovered entirely based on kilowatt-hours consumed, providing no incentive to consider when or how quickly electricity was consumed. The capacity tariff introduces a demand-based component where a portion of network costs is allocated according to peak power demand measured in kilowatts rather than total energy consumption [31]. The digital meter records the average power demand during each fifteen-minute interval, and the highest such interval each month determines that month's peak demand. Annual network charges are then calculated based on the average of these twelve monthly peaks.

This tariff structure creates clear incentives for households to spread their electricity consumption more evenly across time, avoiding situations where multiple high-power devices operate simultaneously. For households with electric vehicles, heat pumps, or other high-power loads, intelligent coordination of these devices can substantially reduce peak demand without compromising service quality [32]. A HEMS capable of monitoring real-time power consumption and automatically adjusting device operation to avoid peak demand spikes can therefore deliver direct financial benefits under this tariff regime.

The capacity tariff applies only in Flanders and only to households with digital meters. Those with analog meters, which cannot measure peak demand, are assigned a fixed deemed peak for tariff calculation purposes. The Brussels Capital Region and Wallonia have not yet implemented similar capacity-based tariff structures, though developments in these regions are anticipated as smart meter penetration increases [33].

3.3 Dynamic Electricity Tariffs and Flexibility Markets

Beyond the capacity tariff affecting network charges, the energy component of electricity bills is increasingly available under dynamic pricing structures that vary according to wholesale market conditions. Dynamic tariffs, where the price per kilowatt-hour changes hourly based on day-ahead market prices, create opportunities for consumers with flexible loads to reduce costs by shifting consumption to periods of lower prices, which typically correspond to periods of high renewable generation [34].

In Flanders, dynamic electricity contracts have been available since approximately 2022, with suppliers including Ecopower and Eneco, partners in the Interflex project, offering tariffs directly linked to EPEX Spot wholesale prices [35]. The Brussels Capital Region enabled dynamic tariff offerings from June 1, 2025, following regulatory changes permitting this pricing model [36]. Participation requires a digital meter with data sharing consent, as suppliers need access to hourly consumption data for billing purposes.

The Belgian flexibility market framework, established through federal legislation in 2017, grants all end consumers the right to valorize their energy flexibility through contracts with electricity suppliers or dedicated flexibility service providers [37]. This framework positions Belgium among the more advanced European countries for residential demand response, alongside France, Great Britain, and Greece which similarly allow independent aggregator participation in flexibility markets [38]. However, practical implementation remains limited, with most residential flexibility participation occurring through implicit mechanisms such as dynamic tariffs rather than explicit demand response programs with direct aggregator control.

Research conducted under the InterFlex project has explored the potential for dynamic pricing to unlock residential flexibility in Belgium, finding that benefits depend heavily on household characteristics and the availability of flexible assets [39]. Electric vehicles showed the greatest potential for benefiting from dynamic tariffs, though without automated steering the advantage remained limited. These findings underscore the importance of HEMS capabilities in translating theoretical flexibility potential into realized benefits.

4. Evaluation Framework

4.1 Framework Structure and Rationale

The evaluation framework developed in this report employs a three-tier structure designed to provide both absolute and comparative assessment of HEMS platforms. The first tier establishes minimum requirements that any system must meet to be considered suitable for residential flexibility applications. The second tier defines graduated scoring criteria enabling nuanced comparison across multiple capability dimensions. The third tier provides design guidelines for systems intended to support future demand response services that may not yet be fully defined.

This structure recognizes that the HEMS market serves diverse user needs and technical contexts. A monitoring-focused solution suitable for a household seeking basic visibility into energy consumption differs fundamentally from a sophisticated optimization platform intended for demand response participation. Rather than attempting to identify a single "best" system, the framework enables stakeholders to evaluate platforms against their specific requirements while ensuring baseline adequacy across all evaluated solutions.

4.2 Minimum Requirements

The minimum requirements represent non-negotiable capabilities that any HEMS considered for Belgian residential flexibility deployment must possess. These requirements address security, core functionality, and basic interoperability, establishing a threshold below which systems should not be recommended regardless of other strengths.

4.2.1 Security and Privacy Requirements

Security requirements derive from the ETSI EN 303 645 baseline adapted for energy management context. Systems must not use universal default passwords, instead requiring unique credentials or user-defined passwords during initial setup. All communications, whether between the HEMS and connected devices or between the HEMS and cloud services, must employ encryption using current best-practice cryptographic methods [21]. Systems must provide a mechanism for firmware updates enabling security patches to be deployed when vulnerabilities are discovered. Clear documentation must describe what data is collected, how it is processed, with whom it may be shared, and for what purposes, enabling users to provide informed consent. Finally, systems must offer an option for local-only operation where core functionality remains available without mandatory cloud connectivity, preserving user autonomy over data sharing decisions.

4.2.2 Core Functionality Requirements

Functional requirements ensure systems can perform basic energy management tasks in the Belgian context. Compatibility with Belgian smart meters via P1 port using DSMR 5.0.2 protocol is essential, as this provides the foundation for whole-house energy monitoring. Systems must provide real-time power monitoring with latency not exceeding ten seconds, enabling users to understand current energy flows and supporting time-sensitive optimization. Historical data storage for at least thirty days enables trend analysis and performance evaluation. Basic visualization capabilities must present consumption and, where applicable, production data in understandable formats accessible to non-technical users.

4.2.3 Interoperability Requirements

Interoperability requirements ensure systems can integrate with the broader smart home and energy ecosystem. Support for at least one widely-adopted device communication protocol—Zigbee, Z-Wave, WiFi, or Matter—enables connection with third-party devices beyond any proprietary ecosystem. API access, whether local or through documented cloud interfaces, enables data export and integration with other systems. Demonstrated compatibility with at least one major smart home platform such as Home Assistant, Google Home, Amazon Alexa, or Apple HomeKit indicates openness to ecosystem integration.

4.3 Capability Scoring Criteria

Beyond minimum requirements, the scoring criteria enable graduated assessment across six capability categories. Each category is scored from zero to five, with explicit definitions for each score level ensuring consistent evaluation. Categories are weighted according to their importance for residential flexibility applications.

4.3.1 Energy Monitoring (Weight: 15%)

Energy monitoring capabilities determine the granularity and comprehensiveness of data available for optimization and user insight. A score of zero indicates no energy monitoring capability. Score one indicates total consumption monitoring only through manual data entry. Score two indicates automated smart meter reading via P1 port or equivalent. Score three adds production monitoring for solar or other generation. Score four adds per-device or per-circuit consumption breakdown through sub-metering or disaggregation. Score five adds power quality monitoring, phase-level data, and integration of additional utilities such as gas or water.

4.3.2 Device Integration and Control (Weight: 20%)

Device integration capabilities determine the range of assets that can be coordinated within the energy management strategy. Score zero indicates no device control capability. Score one indicates basic on/off control through smart plugs or switches. Score two adds timer and schedule-based control. Score three adds integration with either electric vehicle chargers or heat pumps, representing major flexible loads. Score four adds integration with both EV chargers and heat pumps plus battery storage systems. Score five adds native support for energy-specific protocols such as EEBUS or SG Ready, enabling sophisticated coordination with manufacturer-supported interfaces.

4.3.3 Optimization Capabilities (Weight: 20%)

Optimization capabilities determine how intelligently the system can manage energy flows to achieve user objectives. Score zero indicates no optimization capability. Score one indicates manual recommendations provided to users without automated action. Score two indicates rule-based automation using if-then logic configured by users. Score three indicates automated solar self-consumption optimization adjusting device operation to maximize use of locally generated electricity. Score four adds dynamic tariff optimization responding to time-varying electricity prices and peak demand management for capacity tariff reduction. Score five adds predictive optimization incorporating weather forecasts, consumption predictions, and multi-objective optimization balancing cost, comfort, and environmental goals.

4.3.4 Demand Response Readiness (Weight: 20%)

Demand response readiness evaluates preparedness for integration with external flexibility services, whether through aggregators, grid operators, or energy retailers. Score zero indicates no demand response capability. Score one indicates manual response to external price signals or flexibility requests. Score two indicates automated response to price signals received through standard data feeds. Score three indicates availability of external APIs enabling third-party aggregators to query flexibility availability and request adjustments. Score four indicates OpenADR Virtual End Node capability or equivalent standardized demand response interface. Score five indicates comprehensive flexibility quantification, forecasting, and support for bidding into flexibility markets.

4.3.5 User Transparency and Control (Weight: 15%)

User transparency evaluates how effectively the system informs users about energy management decisions and enables them to maintain appropriate control. Score zero indicates no user interface. Score one indicates basic status display showing current system state. Score two indicates historical data visualization enabling users to understand consumption patterns over time. Score three adds clear disclosure of data usage, explanation of automated decisions, and easy override controls. Score four adds asset impact visualization showing how energy management affects specific devices and comprehensive cost tracking. Score five adds capacity tariff monitoring with peak demand alerts and visualization of household contribution to grid flexibility services.

4.3.6 Interoperability (Weight: 10%)

Interoperability evaluates openness to integration beyond the core platform, enabling users to combine best-of-breed components and avoid vendor lock-in. Score zero indicates a completely closed system with no external integration capability. Score one indicates support for a single device communication protocol. Score two indicates support for multiple protocols covering two to three standards. Score three adds open API access and documented integration with platforms such as Home Assistant. Score four adds Matter protocol support and MQTT messaging capability enabling flexible integration patterns. Score five indicates EEBUS certification and OpenADR readiness representing comprehensive support for energy-specific interoperability standards.

4.4 Design Guidelines for Future-Ready Systems

Beyond evaluation of current capabilities, this section provides guidance for HEMS developers and system integrators seeking to create solutions prepared for evolving flexibility requirements.

4.4.1 Architectural Principles

Future-ready HEMS should adopt local-first processing architectures where time-critical optimization occurs on-premise without dependence on cloud connectivity. This approach ensures continued operation during internet outages, minimizes latency for real-time control, and provides inherent privacy protection. Cloud services should enhance rather than enable core functionality, providing features such as advanced analytics, remote access, and integration with external services while remaining non-essential for basic operation.

Modular design separating measurement, control, and optimization layers enables flexibility in system evolution. As new devices, protocols, or optimization algorithms emerge, modular systems can incorporate improvements without wholesale replacement. Open interfaces between modules enable third-party contribution and customization for specific use cases.

4.4.2 Protocol Strategy

Given the evolving standards landscape, systems should support multiple protocols while positioning for convergence. For device communication, Matter support should be prioritized for new integrations given its trajectory toward industry-wide adoption and explicit energy management features in recent specification versions. Zigbee 3.0 support remains important for backward compatibility with the large installed base of Zigbee devices. For energy-specific communication, EEBUS represents the most comprehensive standard for coordination with heat pumps and electric vehicle chargers, particularly those from European manufacturers. Systems targeting flexibility market participation should prepare OpenADR 2.0b Virtual End Node capability, anticipating that this or similar standards will be required as the EU Network Code on Demand Response takes effect.

4.4.3 Data Model Requirements

Systems intended for flexibility services must maintain appropriate data structures enabling flexibility quantification and response. For each controllable device, the system should track current operating state, flexibility potential including how much consumption can be increased or decreased over various time horizons, constraints reflecting user preferences and comfort requirements, and historical patterns enabling prediction of future flexibility availability. This data enables meaningful participation in flexibility markets where value depends on ability to reliably deliver promised demand adjustments.

5. Market Analysis: HEMS Platforms

5.1 Methodology

The market analysis evaluates prominent HEMS platforms available in the Belgian market, applying the framework criteria developed in the previous section. Platform selection prioritized systems with demonstrated Belgian market presence, P1 port compatibility or integration potential, and relevance for residential flexibility applications. Information was gathered from official product documentation, developer resources, user community forums, and published reviews.

For each platform, the analysis provides an overview of system characteristics, assessment of Belgian market integration, identification of strengths and weaknesses for flexibility applications, demand response readiness evaluation, and scoring across framework categories.

5.2 Home Assistant

Home Assistant is an open-source home automation platform that has evolved to include sophisticated energy management capabilities. The system runs locally on various hardware platforms including Raspberry Pi single-board computers, Intel NUC mini-PCs, network-attached storage devices, and dedicated hardware such as the Home Assistant Yellow [40]. All processing occurs on-premise, with cloud services entirely optional.

The platform's strength lies in its extraordinary breadth of integrations, with over 2,500 different devices and services supported through community-developed and official integrations [41]. For Belgian users, native DSMR integration enables direct P1 port connectivity with Fluvius digital meters, while community-developed integrations provide access to Fluvius cloud data and other Belgian-specific services. The Energy Dashboard, introduced in 2021, provides dedicated visualization of electricity, gas, and water consumption along with solar production tracking [42].

For optimization, Home Assistant supports rule-based automation through its automation engine and more sophisticated optimization through add-ons such as EMHASS (Energy Management for Home Assistant), which implements model predictive control for cost optimization considering solar forecasts, consumption predictions, and electricity prices [43]. Integration with dynamic tariff providers including Tibber enables automated response to time-varying prices. Community-developed blueprints provide pre-configured automation for solar excess utilization, enabling devices to activate when surplus generation is available.

Belgian-specific features including capacity tariff monitoring require manual configuration using community templates and custom sensors, reflecting the platform's flexibility but also its technical complexity [44]. Home Assistant's learning curve is steep, requiring comfort with configuration files and technical concepts that may challenge non-technical users. However, for users willing to invest in configuration, the platform offers unmatched capability and customization.

Demand response readiness is moderate. While Home Assistant can respond to price signals and implement sophisticated optimization, it lacks native OpenADR support or standardized aggregator interfaces. Integration with external flexibility services would require custom development or rely on intermediary platforms.

Score Summary:

Category	Score	Rationale
Energy Monitoring	5	Comprehensive P1 support, production monitoring, sub-metering integration
Device Integration	5	2,500+ integrations, all major device categories
Optimization	4	EMHASS add-on, rule-based automation, price response
DR Readiness	3	Price signal response, API available, no native DR protocols
User Transparency	4	Energy dashboard, extensive logging, customizable
Interoperability	5	Maximum openness, Matter support, extensive API
Weighted Total	**4.2**	

5.3 Homey Pro

Homey

Homey Pro is a commercial smart home hub developed by Dutch company Athom, acquired by LG Electronics in 2024 [45]. The system emphasizes user-friendly design and broad protocol support, positioning as an accessible alternative to more technical platforms while maintaining local processing capability.

The current generation Homey Pro supports multiple wireless protocols including Zigbee, Z-Wave, Thread, Matter, Bluetooth, WiFi, 433 MHz, and infrared, providing exceptional device compatibility [46]. Energy management features have been substantially enhanced with the introduction of Homey Energy, providing visualization of household energy flows, and the Homey Energy Dongle, a €39 accessory enabling P1 port connectivity with Belgian smart meters [47]. The dongle became available for purchase in early 2025 and is explicitly marketed for Belgium among other European countries.

Homey Energy provides real-time monitoring of electricity consumption and production, historical data visualization, and identification of standby consumption across connected devices. The system can estimate energy usage for devices that don't report consumption directly based on their operational state and known characteristics [48]. Integration with major solar inverter brands including Huawei, SolarEdge, Fronius, and Enphase enables production monitoring.

For optimization, Homey supports automation through its Flow system, which enables if-then-else logic combining triggers, conditions, and actions across connected devices. Advanced Flow provides more sophisticated capabilities including parallel execution paths and complex conditional logic [49]. However, dedicated energy optimization algorithms comparable to EMHASS are not currently available. Dynamic tariff support was announced for Q1 2025, which will enable automated response to time-varying electricity prices.

The platform's primary strength is accessibility. The mobile application provides an intuitive interface suitable for non-technical users, and the Flow automation system is substantially more approachable than Home Assistant's YAML-based configuration. However, this accessibility comes with reduced flexibility compared to open-source alternatives, and advanced users may find the platform constraining.

Score Summary:

Category	Score	Rationale
Energy Monitoring	4	P1 dongle support, production monitoring, device estimation
Device Integration	4	Excellent protocol support, major brands integrated
Optimization	3	Flow automation, dynamic tariffs planned, no predictive optimization
DR Readiness	2	Basic automation, no aggregator interfaces
User Transparency	4	Excellent app interface, clear visualization
Interoperability	4	Multi-protocol, Matter support, API available
Weighted Total	**3.6**	

5.4 HomeWizard

homewizard

HomeWizard is a Dutch company focused specifically on energy monitoring products rather than broad home automation. Their product lineup centers on the P1 Meter, a compact device connecting directly to smart meter P1 ports, along with complementary products including energy sockets with power measurement and kWh meters for solar or circuit-level monitoring [50].

For Belgian deployment, the HomeWizard P1 Meter provides straightforward plug-and-play installation on Fluvius, Sibelga, Ores, and Resa meters once the P1 port is activated [51]. The device transmits data over WiFi to the HomeWizard Energy app, which provides visualization of electricity consumption and injection along with gas usage where available. Historical data storage enables trend analysis, and users can enter tariff information for cost tracking.

A critical feature distinguishing HomeWizard from proprietary monitoring solutions is its local API, which enables direct access to meter data from other systems without cloud dependency [52]. This API has enabled official integration with Home Assistant, certified through the "Works With Home Assistant" program, allowing users to combine HomeWizard's affordable hardware with Home Assistant's sophisticated automation capabilities. The open approach has fostered adoption among technically-oriented users who value data sovereignty and integration flexibility.

The Energy+ subscription, priced at €0.99 monthly, adds enhanced features including longer data retention, three-phase data for compatible meters, EnergySaver automation for Energy Sockets responding to solar surplus, and integration with solar inverters from SolarEdge, Huawei, Growatt, and other manufacturers [53].

HomeWizard's limitation is its monitoring-centric focus. While Energy Sockets can be automated based on surplus energy, the system lacks integration with major flexible loads such as heat pumps and electric vehicle chargers. Users seeking comprehensive energy management must combine HomeWizard hardware with platforms such as Home Assistant or Homey that provide broader device integration and optimization capabilities.

Score Summary:

Category	Score	Rationale
Energy Monitoring	4	Excellent P1 support, solar integration available
Device Integration	2	Limited to Energy Sockets, no HVAC/EV
Optimization	2	Basic EnergySaver automation, price entry for tracking
DR Readiness	1	Data available via API for external systems
User Transparency	4	Clear app interface, good visualization
Interoperability	3	Local API, Home Assistant integration, open approach
Weighted Total	**2.8**	

5.5 Smappee

Smappee is a Belgian company founded in 2012 that has developed energy management solutions for both residential and commercial applications. The company pioneered non-intrusive load monitoring (NILM) technology that can identify individual appliances from aggregate electrical signatures, and has evolved to offer comprehensive energy management through its Smappee Infinity system [54].

Smappee Infinity employs a modular architecture centered on the Smappee Genius gateway, which connects to measurement modules using current transformers installed on individual circuits or the main supply. Unlike P1-based solutions that rely on smart meter data, Smappee's CT-based approach provides independent measurement capability and can offer circuit-level granularity beyond what smart meters provide [55]. The system supports electricity, gas, and water monitoring through appropriate sensors.

The platform emphasizes dynamic load balancing for electric vehicle charging, automatically adjusting charge rates to prevent overloading the home connection while maximizing charging speed when capacity is available. Integration with the Smappee EV Line of charging stations enables coordinated control, while support for third-party chargers extends applicability [56]. The Smappee app provides automation capabilities enabling users to configure responses to solar surplus, time schedules, or other triggers.

For Belgian market fit, Smappee's local origin translates to strong installer network presence and familiarity with local requirements. However, the system's professional-grade positioning means higher price points and typically professional installation requirements compared to consumer-focused alternatives. The cloud-dependent architecture for full functionality may concern privacy-conscious users, though local control capabilities exist.

User reviews indicate mixed experiences with the mobile application, suggesting user interface refinement opportunities. The NILM appliance detection feature, while innovative, reportedly provides variable accuracy depending on appliance characteristics and electrical installation [57].

Score Summary:

Category	Score	Rationale
Energy Monitoring	5	Circuit-level CT measurement, NILM, multi-utility
Device Integration	4	EV charging focus, smart plugs, appliance detection
Optimization	3	Dynamic load balancing, automation, self-consumption
DR Readiness	3	MQTT integration, aggregator pilots documented
User Transparency	3	Functional app, some UX concerns reported
Interoperability	3	MQTT, Home Connect integration, limited protocols
Weighted Total	**3.4**	

5.6 SMA Sunny Home Manager 2.0

The SMA Sunny Home Manager 2.0 is an energy management device from German solar inverter manufacturer SMA, designed to optimize energy flows in residential photovoltaic systems. The device combines energy metering capability for installations up to 63A with intelligent control of connected devices based on solar production forecasts and household consumption patterns [58].

Unlike standalone HEMS platforms, the Sunny Home Manager integrates within the SMA ecosystem, communicating with SMA inverters via Speedwire and accessing the Sunny Portal cloud platform for visualization and configuration. The system monitors PV generation, battery storage state where applicable, grid import/export, and consumption by connected loads, using this information to optimize self-consumption through automated scheduling [59].

A significant capability is forecast-based optimization. The Sunny Home Manager retrieves weather forecasts and combines these with learned household consumption patterns to predict energy availability throughout the day. This enables proactive scheduling of flexible loads to periods of expected solar surplus rather than purely reactive response to current conditions [60].

For device control, the system supports multiple protocols. EEBUS integration enables sophisticated communication with compatible heat pumps from manufacturers including Vaillant, supporting coordinated operation that respects both energy availability and thermal comfort requirements [61]. SEMP (Simple Energy Management Protocol) provides a lighter-weight option for devices not supporting EEBUS. Compatibility with smart plugs enables on/off control of simpler loads.

Belgian market suitability is moderate. The system does not connect directly to P1 ports, instead relying on its integrated metering at the grid connection point or external SMA Energy Meters. For households with SMA solar installations, the Sunny Home Manager provides capable energy management well-integrated with their existing equipment. However, the SMA ecosystem lock-in limits applicability for households with other inverter brands or those seeking vendor-neutral solutions.

SMA has announced plans for EPEX Spot pricing integration in Belgium, enabling dynamic tariff response, with availability expected in 2026 [62].

Score Summary:

Category	Score	Rationale
Energy Monitoring	4	Integrated metering, production monitoring, limited P1
Device Integration	3	EEBUS heat pumps, SEMP devices, SMA ecosystem
Optimization	4	Forecast-based scheduling, self-consumption optimization
DR Readiness	3	EEBUS LPC support, §14a EnWG compliance, limited DR
User Transparency	4	Sunny Portal visualization, scheduling insight
Interoperability	3	EEBUS, SEMP, but SMA ecosystem dependent
Weighted Total	**3.5**	

5.7 evcc

evcc (Electric Vehicle Charge Controller) is an open-source energy management system focused specifically on optimizing electric vehicle charging. The project, developed primarily by a German community, provides sophisticated charging control that integrates with an extensive range of EV chargers, solar inverters, and vehicles [63].

The system runs locally on hardware including Raspberry Pi, standard PCs, or Docker containers, processing all data on-premise without cloud dependency. Configuration is performed through YAML files, requiring technical competency similar to Home Assistant though with narrower scope focused on charging optimization.

evcc's distinguishing feature is its comprehensive device support. Over 100 EV charger brands are supported, along with more than 70 inverter and battery systems, and vehicle integrations for most major automotive manufacturers enabling features such as state-of-charge reading and charge limit setting [64]. For Belgian deployment, HomeWizard P1

Meter integration and native DSMR support enable grid consumption monitoring, while support for Belgian dynamic tariff providers enables price-optimized charging.

Charging optimization operates in multiple modes. Solar surplus mode adjusts charging power continuously to match available excess generation, minimizing grid import while maximizing solar utilization. Minimum+solar mode ensures a minimum charge rate while boosting when surplus is available. Fast mode charges at maximum rate regardless of solar availability. Planned charging enables target departure times and charge levels, with the system optimizing timing based on prices or solar forecasts [65].

Home battery coordination prevents undesirable interactions where charging the EV would discharge the home battery, while enabling grid-to-vehicle charging during low-price periods when beneficial. Dynamic tariff integration automatically schedules charging during cheapest hours when immediate solar charging is unavailable [66].

While evcc excels for EV charging optimization, its narrow focus means it doesn't address other household energy management needs such as heat pump control or appliance scheduling. Users seeking comprehensive HEMS typically deploy evcc alongside broader platforms like Home Assistant, using evcc's superior charging optimization while relying on the broader platform for other automation.

Score Summary:

Category	Score	Rationale
Energy Monitoring	4	P1/DSMR support, inverter integration, vehicle SOC
Device Integration	4	Extensive EV charger and inverter support, limited HVAC
Optimization	4	Excellent charging optimization, tariff response, forecasts
DR Readiness	3	Price response, API available, no native DR protocols
User Transparency	4	Web UI, charging session history, clear status
Interoperability	4	Open source, extensive device support, MQTT/API
Weighted Total	**3.8**	

5.8 Comparative Summary

The following table summarizes evaluation results across all assessed platforms:

Platform	Type	Belgian P1	Capacity Tariff	Weighted Score
Home Assistant	Open-source	Native DSMR	Via templates	4.2/5
evcc	Open-source	Native DSMR	Manual	3.8/5
Homey Pro	Commercial	Energy Dongle	Planned	3.6/5
SMA SHM 2.0	Inverter-tied	Via meter	No	3.5/5
Smappee	Commercial	CT-based	No	3.4/5
HomeWizard	Monitoring	Native	No	2.8/5

Open-source platforms score highest due to their flexibility, extensive integration capabilities, and community-driven feature development. However, they require technical expertise that limits accessibility for mainstream consumers. Commercial platforms offer better user experience at the cost of reduced flexibility and often lagging feature development for market-specific requirements such as capacity tariff optimization.

6. Conclusions and Recommendations

6.1 Summary of Findings

This report has developed and applied an evaluation framework for Home Energy Management Systems oriented toward residential flexibility deployment in Belgium. The analysis reveals a market in transition, with significant capability gaps alongside rapid development as energy management becomes increasingly central to smart home propositions.

The Belgian context presents both opportunities and challenges for HEMS deployment. The near-universal smart meter infrastructure with accessible P1 ports provides an excellent foundation for energy monitoring. The capacity tariff creates clear economic incentives for peak demand management that HEMS can address. The emerging dynamic tariff market and established flexibility aggregator framework position Belgium among European leaders for residential demand response potential. However, regional fragmentation in meter access policies, lack of standardized Belgian-specific HEMS features, and limited consumer awareness constrain market development.

No single HEMS platform currently meets all requirements for fully automated residential demand response participation as envisioned in future flexibility markets. The highest-scoring platforms excel in device integration and optimization capabilities but lack standardized demand response interfaces such as OpenADR that would enable seamless aggregator integration. Platforms with stronger commercial support often lag in implementing market-specific features such as capacity tariff optimization that require local adaptation. Open-source platforms demonstrate superior flexibility and capability but present accessibility barriers for non-technical users.

The evaluation reveals a fundamental tension between openness and accessibility. Home Assistant achieves the highest overall score through its unmatched integration breadth and customization capability, yet requires technical expertise that excludes most residential users. Commercial platforms like Homey Pro provide substantially better user experience but constrain advanced users and lag in implementing sophisticated energy optimization.

Resolving this tension—creating systems that are simultaneously powerful, flexible, and accessible—represents a key challenge for the HEMS industry.

Demand response readiness emerges as the most significant capability gap across evaluated platforms. While most systems can respond to price signals through automation rules, none provide native support for standardized demand response protocols or comprehensive flexibility quantification. As regulatory requirements for demand-side participation evolve through mechanisms such as the EU Network Code on Demand Response, platforms will need substantial enhancement to enable meaningful participation. The current gap creates urgency for development investment from HEMS providers and potential opportunity for specialized demand response middleware that can bridge between existing HEMS platforms and aggregator systems.

Belgian market integration varies significantly across platforms. Dutch platforms including HomeWizard and Homey demonstrate natural fit given shared smart meter standards, while German platforms require adaptation. The capacity tariff, unique to Flanders within the current scope, receives limited native support, with capable implementation requiring manual configuration even on the most flexible platforms. This situation suggests opportunity for Belgian-focused development, whether through dedicated platforms, market-specific add-ons for existing platforms, or commercial services layering Belgian optimization on top of general-purpose HEMS.

6.2 Recommendations for Stakeholders

6.2.1 For Flexibility Service Providers and Aggregators

Aggregators seeking to access residential flexibility must navigate the fragmented HEMS landscape strategically. Rather than developing integrations for every platform, focus should be placed on platforms combining significant market penetration with accessible integration interfaces. Home Assistant's large and technically-engaged user base, combined with well-documented APIs, makes it an attractive initial target despite the heterogeneity of individual installations. HomeWizard's open local API and growing Belgian installed base provides another accessible integration point, particularly for monitoring data even where control capability is limited.

Development of standardized integration approaches should be prioritized. OpenADR Virtual End Node capability represents the most promising path toward scalable integration, and aggregators should advocate for HEMS platforms to implement this standard while developing their own VTN infrastructure to receive and process demand response signals. Participation in industry initiatives such as EEBUS and Matter energy management development helps shape standards toward flexibility service requirements.

Consumer proposition development must account for HEMS diversity. Offering flexibility services should not require consumers to adopt specific platforms, as this constrains addressable market and creates vendor dependency concerns. Middleware solutions that can interface with multiple HEMS platforms while presenting standardized capability to aggregator systems merit investigation, whether through internal development or partnership.

6.2.2 For HEMS Developers and Manufacturers

Platform developers should prioritize Belgian market adaptation given the favorable regulatory environment and strong residential flexibility potential. Native P1 port support using DSMR 5.0.2 protocol should be standard for any platform marketed in Belgium, eliminating dependency on third-party adapters or cloud bridges that add cost and complexity. Capacity tariff monitoring and optimization represents high-value functionality that currently differentiates platforms in the Flemish market, warranting dedicated development investment.

Protocol strategy should anticipate convergence while maintaining pragmatic current support. Matter energy management features, now including EV charging, solar, batteries, and heat pumps in version 1.4, provide a path toward manufacturer-agnostic device integration that reduces platform development burden. EEBUS implementation enables sophisticated coordination with European heating and mobility equipment. OpenADR or equivalent demand response capability will become increasingly important as flexibility market participation requirements mature.

User experience innovation deserves attention equal to technical capability. The market analysis reveals that platforms with superior user experience often achieve commercial success despite technical limitations, while highly capable platforms struggle with adoption due to complexity. Investment in intuitive interfaces, guided setup processes, and meaningful visualization of energy management value can expand addressable market beyond early-adopter technical users. Particular attention should be paid to making flexibility participation transparent and trustworthy, helping users understand how their assets contribute to grid services while maintaining comfort.

6.2.3 For Policymakers and Regulators

Policy interventions can accelerate residential flexibility deployment by addressing market barriers and creating appropriate incentives. Standardization advocacy at European level should promote adoption of common interfaces for residential demand response, reducing fragmentation that currently impedes aggregator market development. Support for EEBUS, OpenADR, and Matter energy management features in relevant policy instruments signals direction for industry investment.

Consumer protection frameworks should evolve to address energy management system concerns. Requirements for transparency in data handling, clear disclosure of automated decision-making impacts, and guaranteed user override capability help build trust enabling broader adoption. Certification schemes based on ETSI EN 303 645 or equivalent standards establish minimum security baselines while providing consumer guidance.

Within Belgium, harmonization of P1 port activation policies across regions would remove unnecessary barriers to HEMS adoption. The current situation where Flanders provides free online activation, Brussels enables by default, and Wallonia charges fees creates confusion and inequity. Consistent policy enabling free, straightforward activation across all network operators would facilitate market development.

Financial incentives for HEMS deployment merit consideration, particularly for systems demonstrating flexibility capability. Existing support mechanisms for heat pumps and electric vehicles could be extended to include HEMS that enable optimized operation of these assets. Given capacity tariff incentives already encourage appropriate technology, additional incentives might focus specifically on demand response capability, rewarding systems that can participate in explicit flexibility markets.

6.3 Future Outlook

The HEMS market stands at an inflection point where energy management is transitioning from nice-to-have feature to core smart home requirement. Several developments will shape the trajectory over the coming years.

The Matter standard's evolution toward comprehensive energy management support represents perhaps the most significant development for market structure. As Matter achieves critical mass adoption and energy device support matures through versions 1.4, 1.5, and beyond, the current fragmentation of device protocols should diminish. Platforms achieving strong Matter implementation will benefit from simplified integration with expanding device ecosystems, while those failing to keep pace risk marginalization.

Regulatory requirements for demand response participation will crystallize as the EU Network Code takes effect from 2027. The specific technical requirements for residential participation remain under development, but will likely mandate or incentivize standardized interfaces enabling aggregator access to residential flexibility. HEMS platforms preparing for these requirements through OpenADR or equivalent implementation will be positioned advantageously.

Artificial intelligence and machine learning capabilities will increasingly differentiate platform optimization effectiveness. Current rule-based and simple optimization approaches leave substantial value unrealized compared to what predictive, learning systems can achieve. Cloud platforms have advantages in deploying sophisticated ML models, potentially shifting competitive dynamics toward hybrid architectures that combine local control with cloud intelligence.

Belgian-specific market developments will influence local platform success. Extension of capacity tariff or similar demand-based pricing to Brussels and Wallonia would expand the addressable market for peak optimization features. Growth in dynamic tariff adoption creates opportunity for automated price response functionality. Maturation of aggregator offerings providing residential flexibility programs creates demand for HEMS demand response capability.

6.4 Concluding Remarks

The Home Energy Management System has emerged as essential infrastructure for realizing residential flexibility potential in support of the energy transition. This report has provided a framework for evaluating HEMS platforms against requirements for Belgian deployment, revealing both significant current capabilities and important gaps requiring attention.

The path forward requires coordinated effort across stakeholders. HEMS developers must enhance platform capabilities while improving accessibility. Flexibility service providers must develop scalable integration approaches accommodating market heterogeneity. Policymakers must create frameworks enabling and encouraging residential flexibility participation while protecting consumer interests. Consumers must be educated about energy management value and equipped to make informed technology choices.

Successfully navigating this transition promises substantial benefits: reduced energy costs for households, improved integration of variable renewable generation, deferred network investment through peak demand management, and new revenue streams from flexibility services. The technical foundations exist; the challenge now lies in commercial, regulatory, and social dimensions of building a market that delivers on this potential.

The frameworks, evaluations, and recommendations in this report aim to support all stakeholders in this endeavor, providing common reference points for assessing progress and identifying priorities. As the market evolves rapidly, regular framework updates will be necessary to maintain relevance. The authors welcome feedback from practitioners applying these concepts to guide future refinement.

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