

How to Unlock the Renovation Wave?

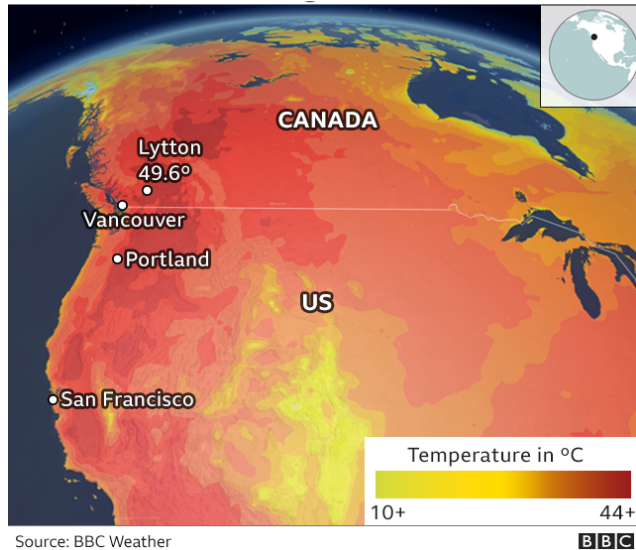


Adrian Joyce

**Director of the
Renovate Europe Campaign**

The Renovation Challenge: State of Play

Global Context: TODAY

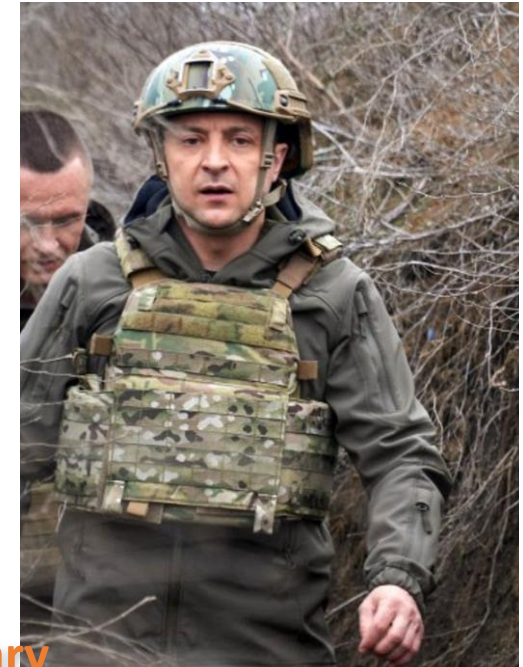


2nd of July 2021
Canada



15th of July 2021
Belgium

Source:
POLITICO Europe



24th of February
2022
Ukraine



Source: CNN

25th of July 2021
China

The Buildings Sector in the EU

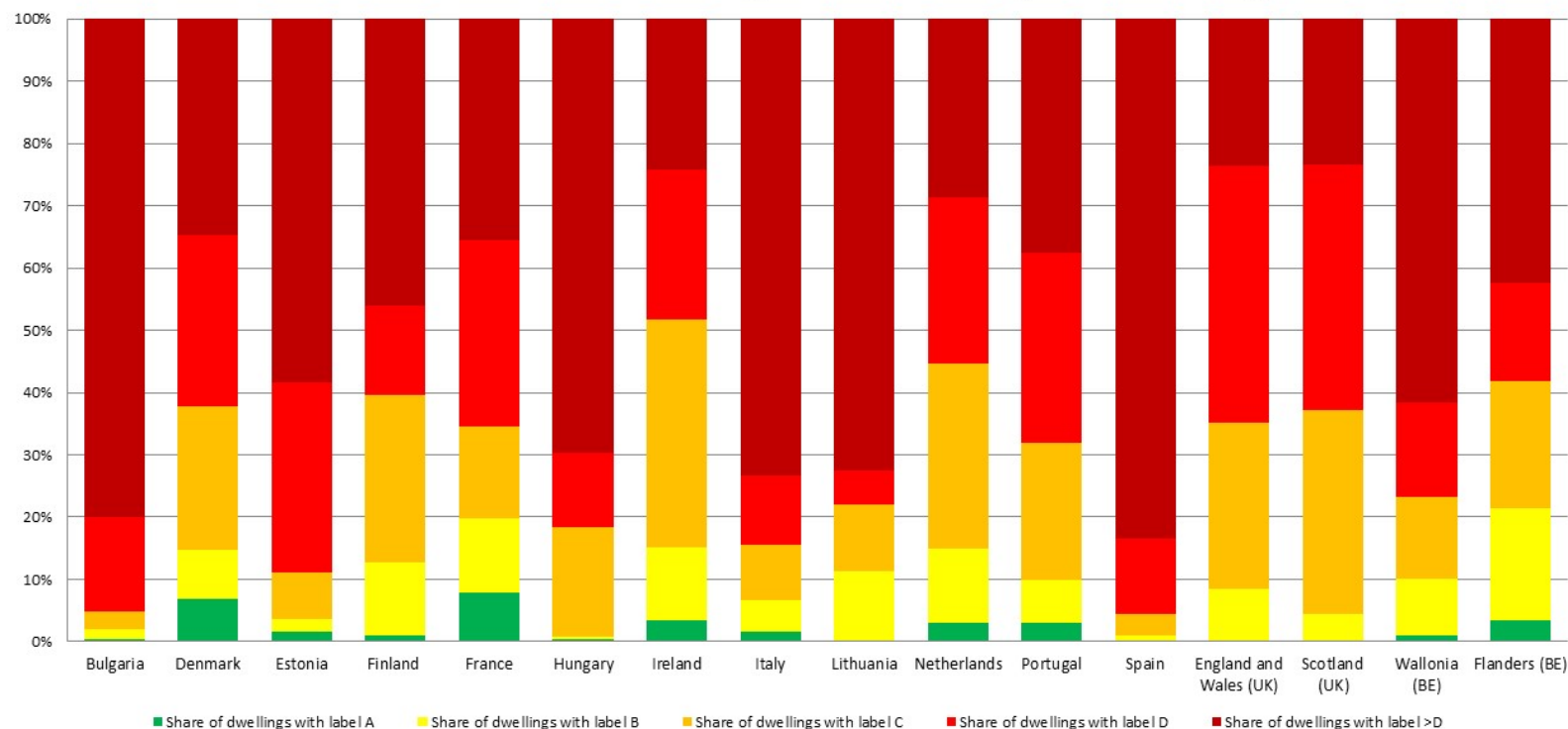
- About 210 million buildings – about the area of Belgium
- Buildings =
 - 50% of annual fixed capital assets
 - 40% of primary energy consumption
 - 36% of GHG emissions
- Construction sector “ecosystem” represents:
 - Annual turnover: €1,400 billion – 9% of EU GDP
 - About 25 million jobs
 - About 3.5 million enterprises
 - 97% of enterprises have less than 10 employees



View of Dinant, Wallonie, Belgium

Characteristics of the Buildings Sector – 1

Distribution of EU Building Stock according to EPC Rating



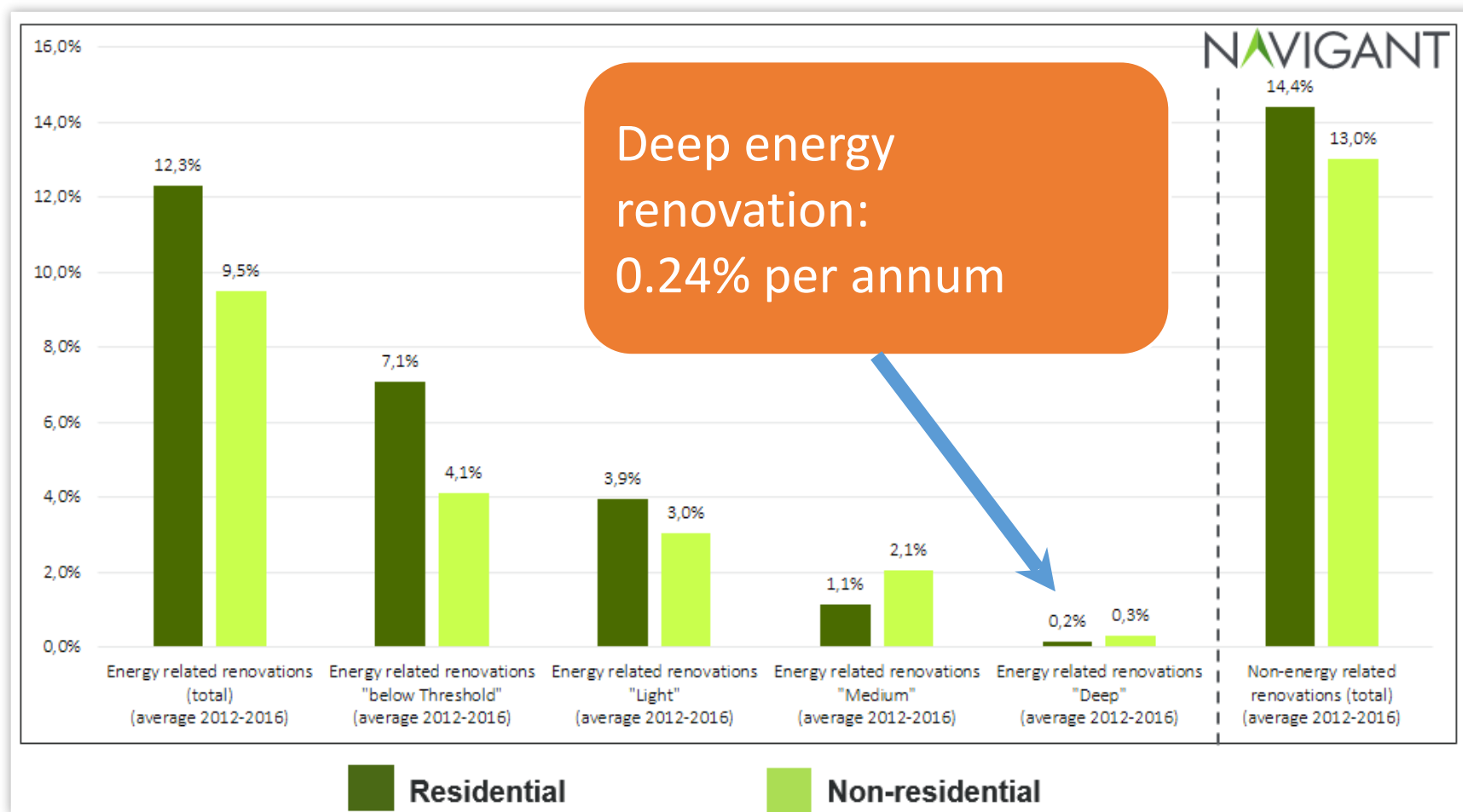
BPIE – 2018

Only 3% of buildings in the EU have an “A” Class rating

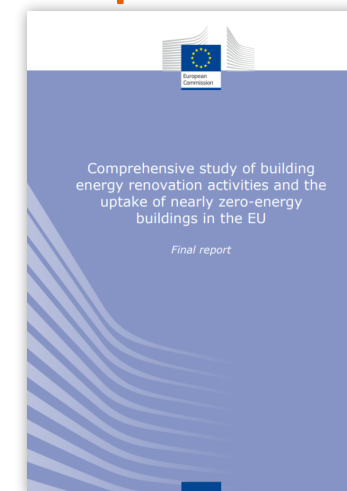
Implies 97% need to have an energy renovation



Characteristics of the Buildings Sector – 2



European Commission 2019



Average savings per energy renovation: 9%

Annual investment in energy renovations: €200bn



EU Policies Affecting Renovation – Update (selection)

1. European Green Deal (Launched October 2019)

Renovation Wave Strategy (suspension of Sustainable Products Initiative)

Revision of key directives and regulations: EED, EPBD, RED, CPR etc

2. Next Generation EU Initiative (launched June 2020)

Recovery and Resilience Facility (Funding)

Renovation a “Flagship” of the RRF

National Recovery and Resilience Plans

3. Fit-for-55 Package (launched in July 2021)

Actual proposals for revisions plus new proposals:

Energy Efficiency Directive – Public buildings, binding EE target, EE1st defined

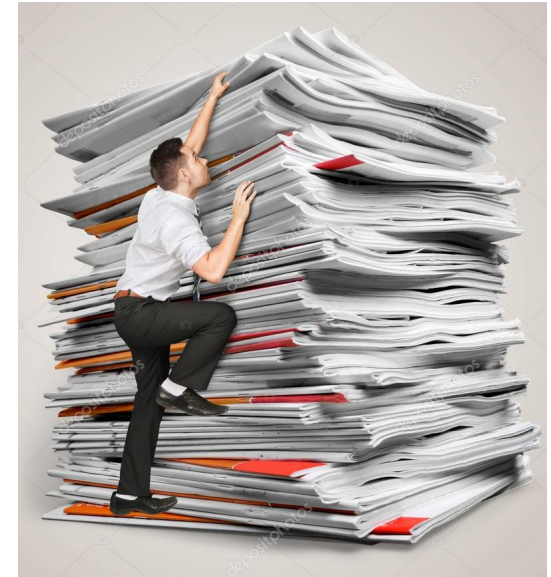
“ETS” for heating fuels – Target of 49% RES on buildings

4. Energy Performance of Buildings Directive (published in December 2021)

Minimum Energy Performance Standards

Definition of Deep Renovation

Update of EPC framework



REPowerEU Action Plan (anticipated)

- **To be built on three pillars**
 - Diversify energy supplies
 - Boost renewable energy supply
 - Bring energy efficiency actions forward
- **Funding the Action Plan**
 - Repackaging existing funds?
 - Boosting the Recovery funds?
- **Opportunity with risks**
 - Reducing energy demand is the sustainable approach
 - Include energy renovation as key measure
 - Resources to ensure quality



Mobilisation is the key word

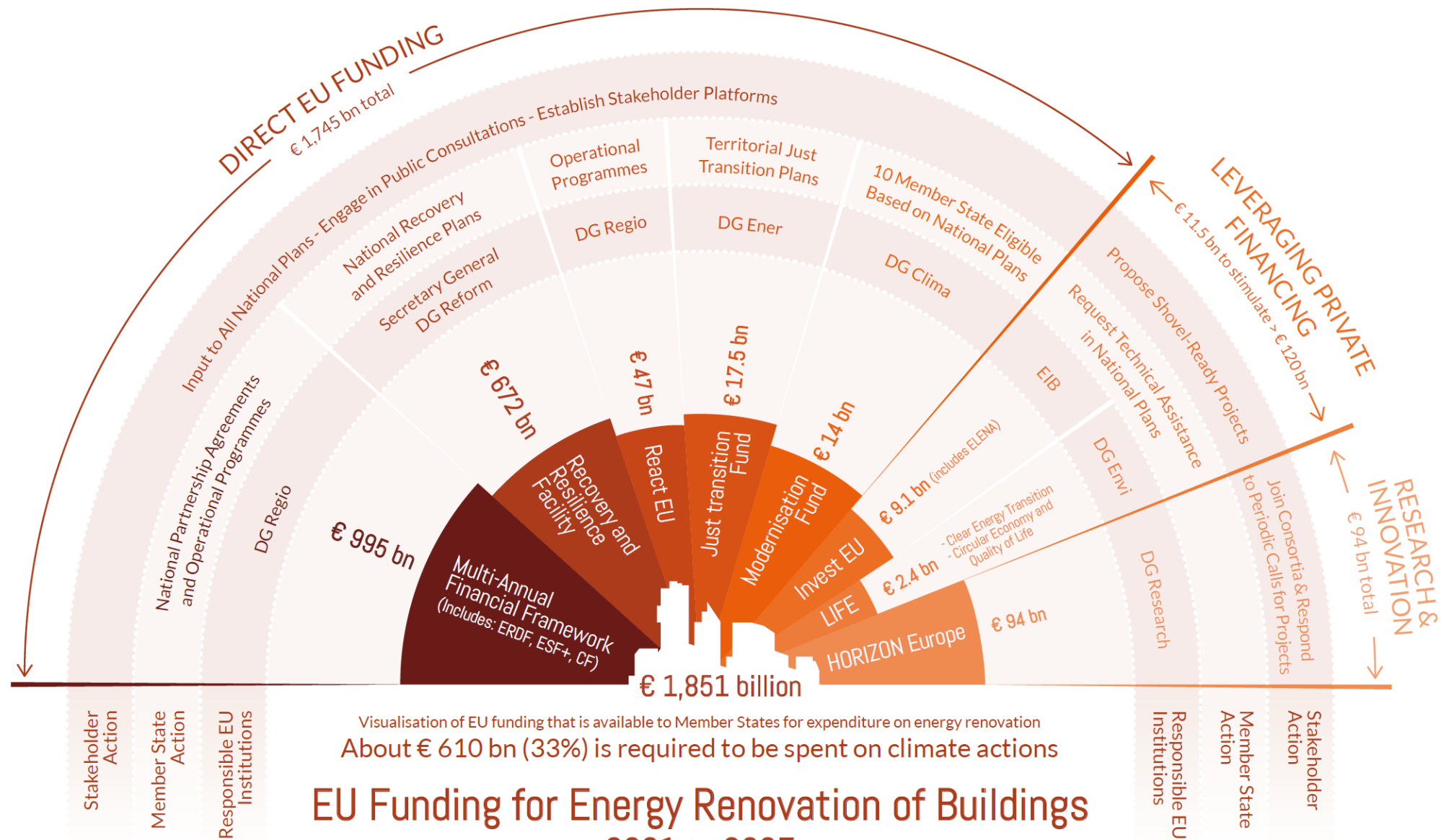
- Technical and Project Development Support
 - At EU level:
 - DG Reform, DG Ener, EIB
 - At national and local level:
 - One-stop shops
 - Energy agencies
- The Whole Value Chain including:
 - Digitalisation and Industrialisation of Renovation
 - Recruitment of new talent
 - Upskilling of existing workforce



Mobilisation is the key word

- National Governments on
 - Long-term Renovation Strategies
 - Recovery and Resilience Plans
 - Stakeholder Engagement
- Building Owners in all Segments
 - Compliance with Minimum Energy Performance Standards (MEPS)
- Financing at EU and National Levels





Note: All numbers based on content of EU Commission Staff Working Document: SWD (2020) 550 final, October 2020

Best Cases – Grand Parc, Bordeaux

Renovation of 530 social housing apartments

Bordeaux, France

Deep energy renovation of 530 dwellings that
were due to be demolished, at a cost of €415/m²

60%
Less energy



Before



After



Best Cases – Grand Parc, Bordeaux

The architects used the addition of winter gardens and an ETICS insulation system to increase useable space, improve daylighting, and significantly upgrade comfort for the inhabitants



Best Cases – Bratislava, Slovakia

Renovation of 88 apartments in this Multi-Family Home

Bratislava, Slovakia

Technologies used:

- ETICS insulation system
- Roof and basement insulation
- Heat pumps and heat recovery ventilation

74%
Less Energy



Before

Photo Credit: Zuzana Sternova



After



Best Cases – Velika Gorica, Croatia

Renovation of Ciciban Kindergarten

Velika Gorica, Croatia

This public building was renovated in 2019, with an ETICS over clad system, replacement of the roof and air tightness detailing. A new thermal heating station was installed to replace the old heating system. The overall result is a much more comfortable building for the occupants who work and go to school here. Cost was approximately €375/m²



Before

Photo credit: City of Velika Gorica

76%
Less Energy



After



The Renovate Europe Campaign

49 Partners



National Partners

18 National Partners

Who are we?

- A **political communications campaign** beating the drum for deep energy renovation of the building stock in the EU
- Supported by **49 partners** from industry and civil society including **18 national partners**
- **Champions** from politics, businesses and communities
- Launched in **2011** as an initiative of **EuroACE**



Thank you for your attention

