



Assessment of the 2nd MS Long-term Renovation Strategies (2017)

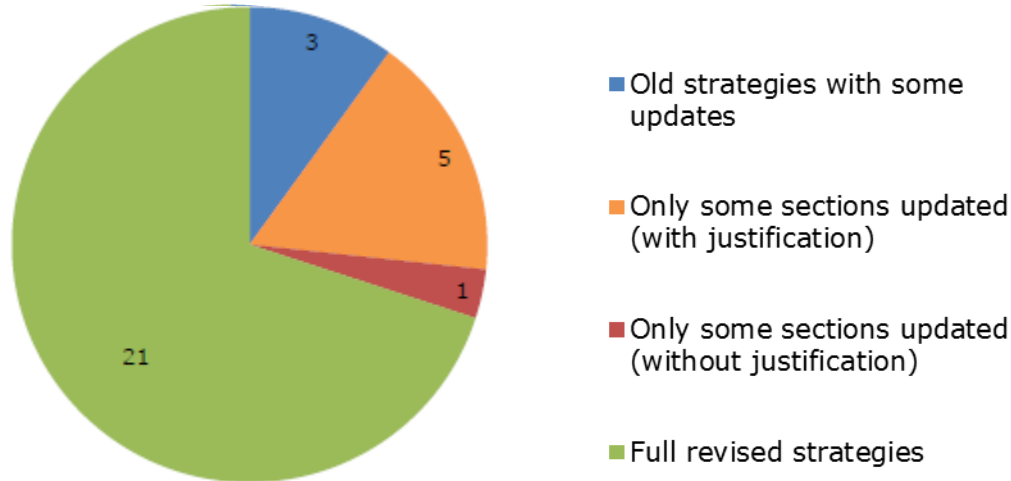
The European Commission's
science and knowledge service
Joint Research Centre

EPBD Committee
Brussels, 25/9/2018

2nd Long-Term Renovation Strategies

MSs interpreted **"updated strategies"** in different ways:

1. 2014 Strategy with some data/sections updated
2. Strategies with only some sections updated, with adequate justification
3. Strategies with only some sections updated, without adequate justification
4. Fully revised strategies



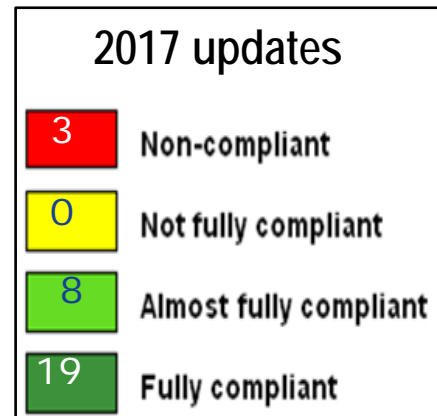
Overall compliance of 2014 strategies vs 2017 updates

NON-COMPLIANT: 2 requirements or more MISSING or UNSATISFACTORY covered (scores 0 or 1)

NOT FULLY COMPLIANT: not compliant with only 1 requirement failed (i.e. 0 or 1), OR at least 3 PARTIALLY COMPLIANT (score=2)

ALMOST FULLY COMPLIANT: PARTIALLY COMPLIANT (score=2) for maximum 2 requirements;

FULLY COMPLIANT: meets all the basic requirements (all the scores ≥ 3) for all the requirements.



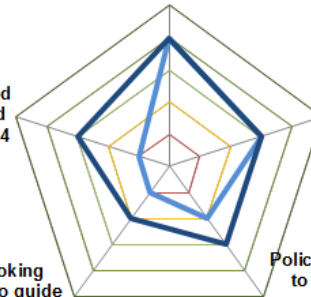
Country fiches

Country	2014		2017	
Document Info	The Austrian renovation strategy is provided as an annex (Annex B) of the NEAP. The document is available in English.		As in 2014: renovation strategy, provided as an annex (Annex B) of the NEAP, and available in English.	
Introduction	The strategy includes the following items: the development of provisions in building law for major renovation as a policy measure, new financial models, changes in the energy mix, rebound effects and changing rates of increase in the use of solar thermal systems and heat pumps in the building stock. For residential buildings the Austrian renovation strategy is based on the national building and housing stock from 2011. For the EED Article 4b provisions, the strategy refers to the cost optimality report (OIB Guidelines 6), submitted pursuant to Article 4(2) of the EPDB 2010/31/EU.		The content of the annex is structured following the requirements of EED article 4 (points (a) to (e)), which differs from the 2014 report. The main part is the description of the regional and Federal financial incentives, with information very similar to 2014 (no major change). Some clarifications are brought about the interpretation of "cost-effective approach". And national statistics about space heating and domestic hot water consumption are used to analyse the trend between 2002 and 2014 and estimate future savings if this trend would continue.	
	pliance	Comment	Score (0-5)	Score (0-5)
Art 4 (a)	Yes	The Austrian building stock is provided for number of units and sqm for each building type, each construction period and energy carrier used for heating. Similar data for tenure status, ownership, climatic zones, energy classes were not provided while they seem to exist in Austria based on the data sources listed in the narrative. As stated in the Austrian Building Energy Code, the calculations are made only for heating demand. The overall consumption of each building category is therefore unknown.	4	4
Art 4 (b)	Yes	In the section "Evidence-based estimate based on the national building stock" of the Austrian Art 4 notification it is mentioned that "The heating demand (HD in kWh/m ² GFAa) for thermally renovated buildings after 2013 was calculated in accordance with OIB Guideline 6 and the selected building typologies", but further information is not provided.	3	3
Art 4 (c)	Partly	Policies and measures are provided by region. Based on the information provided some regions have a more comprehensive policy package than others. In all regions, financial schemes exist to encourage renovation. The main target in Austria is to reduce heating demand and consumption. Subsidies are also provided for the installation of renewable energy systems. The impact of the policies and measures implemented is not provided in the report. A clear strategic assessment of the policy needs to renovate the housing stock is missing.	2	3
Art 4 (d)	No	The strategy provides an estimation of the energy saving potential related to the Austrian building stock, that should be complemented with a financial assessment, in order to properly quantify the overall economic effort and the contribution of the policy package.	1	2
Art 4 (e)	No	Annual energy savings to 2020 are contained in the Excel screenshots, but it is not clear how they were calculated. Wider benefits are not identified.	1	3

Art 4 Compliance AT

Overview of the National Building Stock - Art 4 (a)

Evidence-based estimate of expected energy savings and wider benefits - Art 4 (e)



Cost-effectiveness approaches of renovations - Art 4 (b)

Forward-looking perspective to guide investment decisions - Art 4 (d)

Policies and measures to stimulate cost-effective deep renovations of building - Art 4 (c)

— rates 2014 — rates 2017

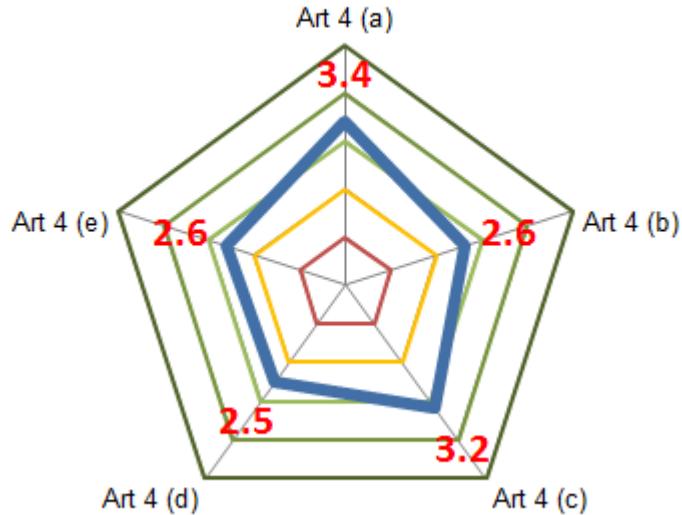


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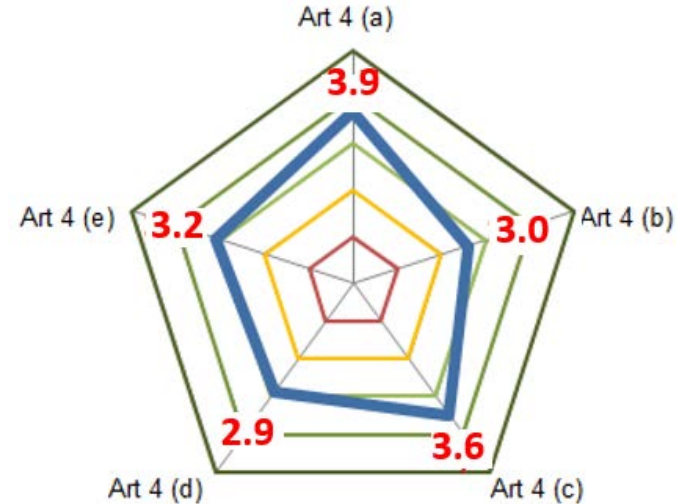
Overall compliance

Average scores of the renovation strategy evaluations

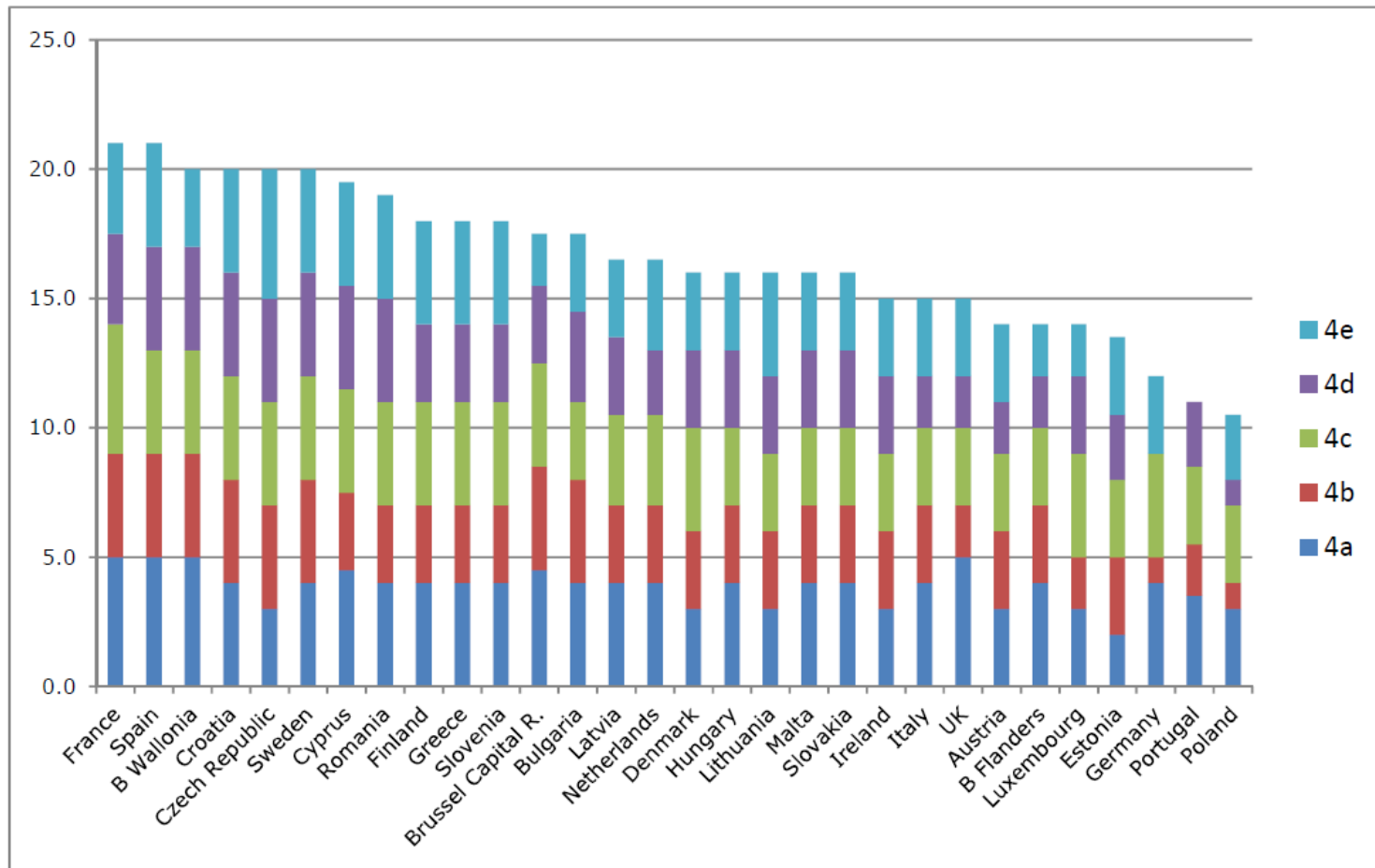
2014 strategies



2017 updates

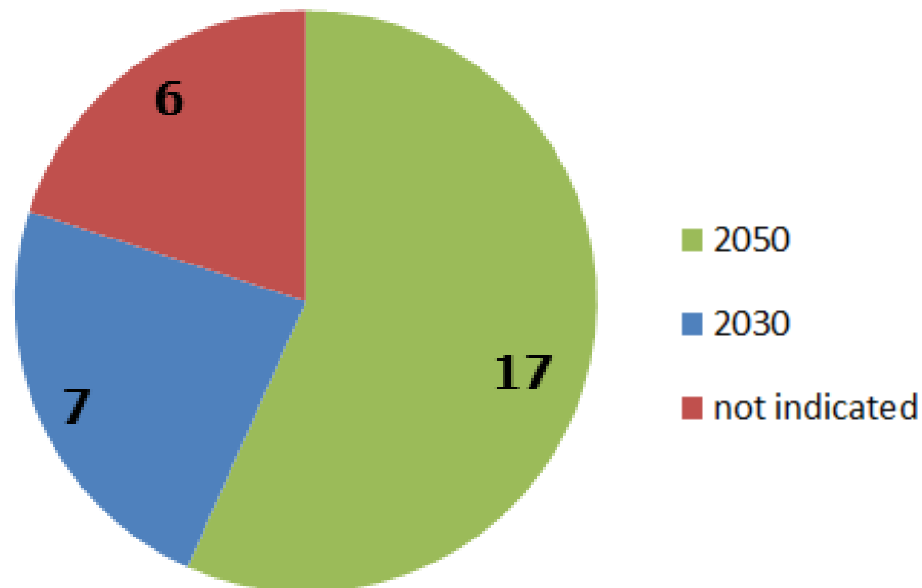


Scores of the 2017 updates



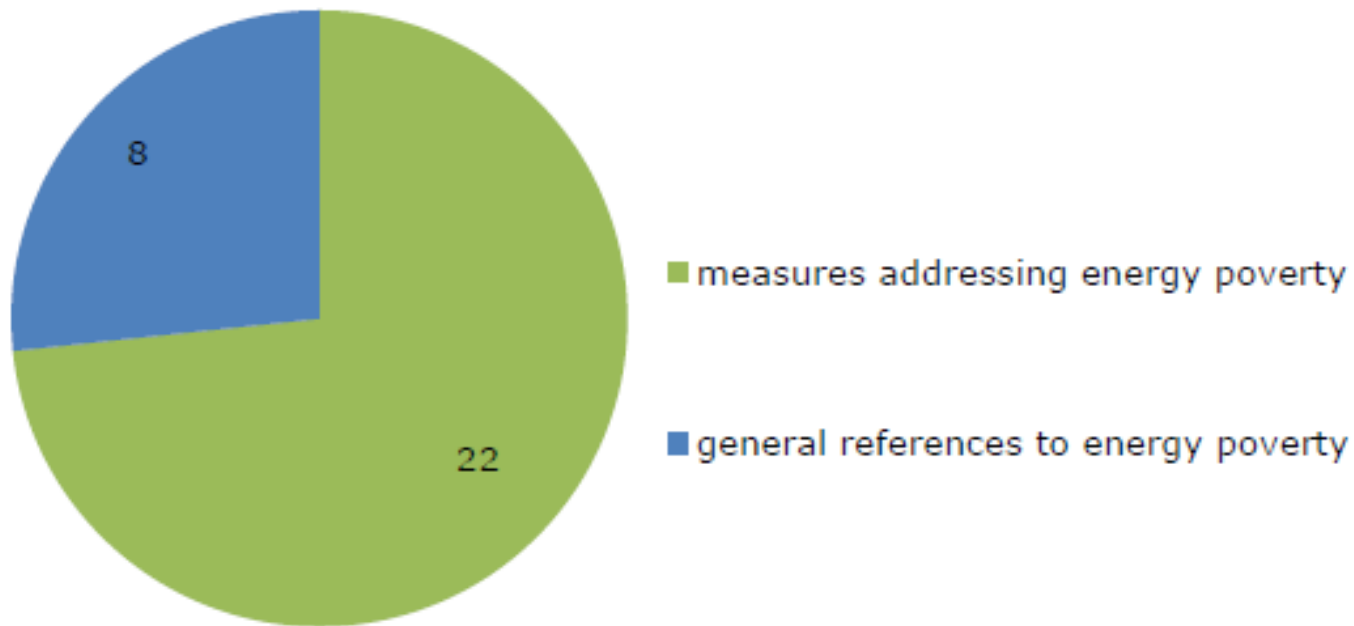
Long-term vision

The majority of the strategies include a 2050 goal



Energy poverty

Majority of the strategies include measures for alleviating energy poverty



Good Practices on RES in buildings in LTRs - 1

AT: "A Federal regulation set requirements for the regional incentives, which ensures that all incentives for energy renovation include a part that is proportional to the energy performance achieved. Most regional programmes also include dedicated or bonus incentive for renewable energy technologies and for ecological materials."

BG: Variety of funding opportunities including financing from the established Energy Efficiency and Renewable Sources Fund (FEEVI).

CY: Financial incentives (e.g. grant scheme for RES and EE interventions),

DE: Cost effective renovation approaches are identified such as the potential of 1400-1800 PJ of renewable energy in buildings by 2050.

HR: In order to select the optimal renovation method for each building category five possible models of

sustainable building renovation, including renovation the installation of efficient technical systems with the utmost level of RES, have been considered.



Good Practices on RES in buildings in LTRs - 2

IE: Clear defined strategic objectives of Ireland's policy on renovation in the residential sector as: switching from fossil fuel to renewable heating technologies

MT: Malta set focus on providing state financial incentives and grants to promote energy efficiency and renewable energy sources in residential buildings.

ES: Some of the most noteworthy measures include the PAREER programme promoting the improvement of energy efficiency and installing renewables in existing buildings, credit access, access to EU funds, awareness raising and training campaigns, building assessment reports, simplification of administration, etc.

NL: As of 1 January 2016, several new subsidy schemes were opened in the Netherlands ranging from support for renewable energy and energy saving in sports facilities to the acquisition of solar water heaters, heat pumps, biomass boilers and pellet stoves for households and commercial users.

EED Art. 18 (use of ESCO)

BE-BRC: The strategy refers to the creation of a regional ESCO targeting public sector buildings in the framework of Regional Plan for Climate, Air and Energy (PACE) and to the extension of existing loans (Prêt Vert Bruxellois) and subsidies (Primes Energie) for energy efficiency

EE: analyse the opportunities for the development of ESCo markets for the improvement of private non-residential buildings (for example for retrofitting lighting or replacing ventilation systems), and how ESCo development could be supported.

IE: Recommendation to investigate possibility for third part financing and implementation of measures through ESCO concept.

LT:"the energy service companies ('ESCO') model should become an important model for the renovation of buildings".

LV: new financial instrument for multi-dwelling residential building, facilitation of the development of the ESCO market; Moreover a comprehensive analysis of the financial sources available for renovation of building is presented (e.g. from private capital owners, EU funds, Banks, ESCO etc).

Art. 20 on financing is not cited in the report. There are several financial measures such as:

All Member States have reported **financial and fiscal measures** supporting energy efficiency improvements in the residential and service sectors. These included grants, low interest loans and fiscal incentives.

BG: national programme for energy efficiency of multi-family buildings, providing both financial and organisational support to homeowner associations registered under the Condominium Management Act for energy efficiency upgrades.

DE: two new measures in Germany: the Heating Optimisation Funding Programme, which provides funding for low-investment measures to optimise existing heating systems and the initiative 'EnEff.Building.2050' which provides funding for model projects demonstrating ambitious energy concepts for buildings/districts with the aim to encourage their widespread adoption.

IE: two pilot schemes: the expansion of the Warmer Homes scheme to homes of private tenants who are in receipt of the Housing Assistance Payment and the Deep Retrofit Pilot Scheme, a new scheme to provide financial support (50% funding of the total capital costs and project management (including design) costs) for substantial upgrades in buildings that achieve an BER level of A3 (<50 kWh/m²) or a minimum uplift of 150 kWh/m² yearly. The rate of funding is up to 95% for voluntary housing association homes and energy poverty households.

AT: establishment of a housing construction investment bank (WBIB). The housing construction investment bank is intended to provide commercial and non-profit property developers with long-term and inexpensive loans to be used for financing affordable living space.

NL: several new subsidy schemes were opened in the Netherlands ranging from support for renewable energy and energy saving in sports facilities to the acquisition of solar water heaters, heat pumps, biomass boilers and pellet stoves for households and commercial users.

SK: new Single-family Building Insulation Support Programme announced in 2016, with an allocated budget EUR 30 million

Conclusions

- Different MS interpretation of "strategy update"
 - *Some MSs took it as an opportunity to improve a not-fully compliant strategy*
 - *Some MSs failed in providing updated information / data, sometimes with no justification*
- Improved collection of data and analysis, e.g. non-residential building stock better covered
- More MSs included scenario analysis on the renovation options, to decide the most appropriate (cost-effective) level of intervention
- More holistic view: issues beyond energy efficiency included
- Energy poverty well covered in almost all the strategies
- Majority of the strategies include a long-term vision: 2050 goal
- Evaluation / monitoring of the policies implemented can be improved (e.g. development of indicators)

**The strategy itself is NOT the result
but the starting point for action!**

Thank you for your attention!

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