

Renovate2Recover: How transformational are the National Recovery Plans for buildings?

Webinar: Cómo acelerar la rehabilitación energética de edificios en España: retos y soluciones

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EUROPEAN ALLIANCE TO
SAVE ENERGY
Creating an Energy-Efficient Europe



RENOVATE EUROPE



E3G



Agenda

- **About the study**
- Key findings & best practices
- Recommendations
- Overview Spain NRRP



REC/ E3G Study on National Recovery & Resilience Plans



Focus of study on these 18 MS:

- ❖ Poland
- ❖ Slovakia
- ❖ Latvia
- ❖ Czechia
- ❖ Hungary
- ❖ Italy
- ❖ Croatia
- ❖ Spain
- ❖ Denmark
- ❖ Ireland
- ❖ Romania
- ❖ Bulgaria
- ❖ Austria
- ❖ Germany
- ❖ Belgium
- ❖ Slovenia
- ❖ Greece
- ❖ France (in cooperation with Mur Manteau & Renovons)

18 National Partners



Renovate2Recover – A Study of Recovery Plans



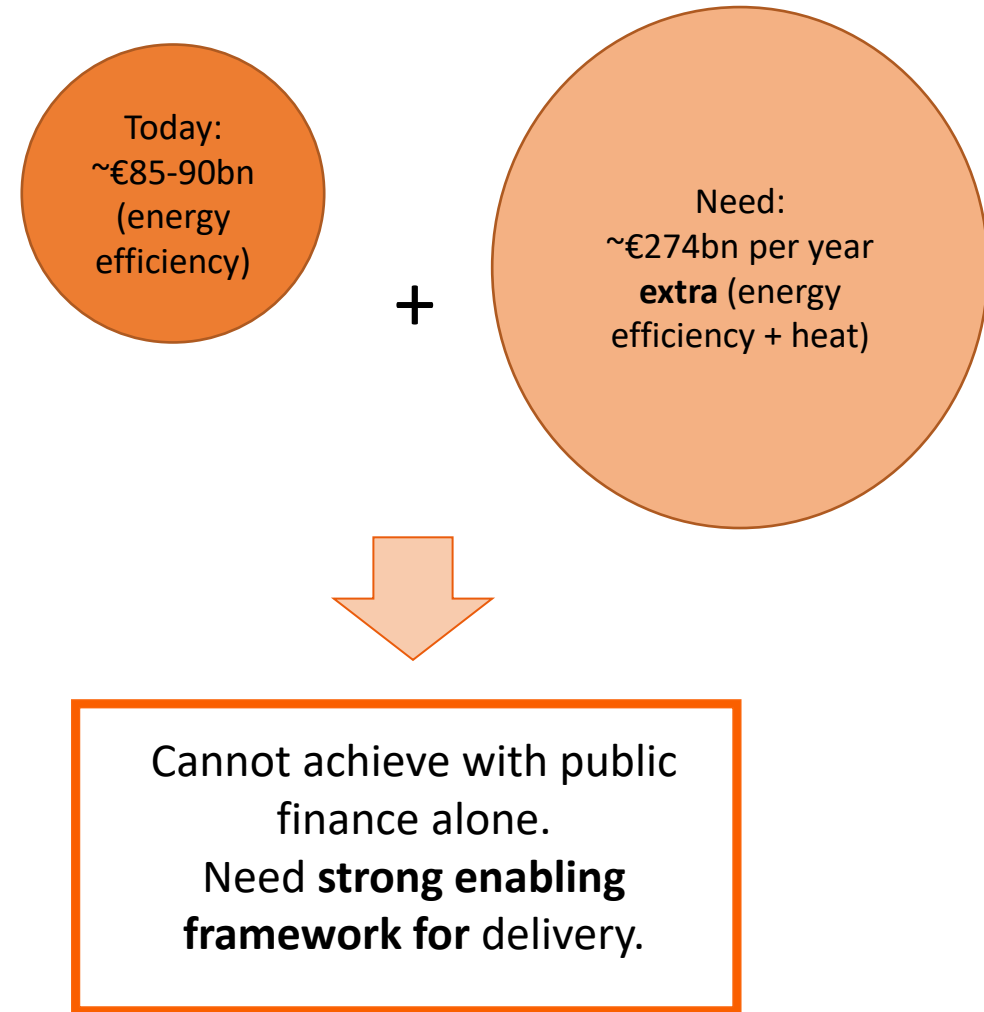
Download the Full Study and individual country profiles [here](#)



Why did we study NRRPs?

- Renovation at intersection of EU's green, economic and social priorities.
- Unique opportunity to kick-start Renovation Wave Strategy implementation.
- Current deep renovation rate at ~1%. Need linear increase to 3%.

*“Under **Flagship Renovate** : By 2025, contribute to the doubling of the renovation rate and the fostering of deep renovations”*



Study scope

1. Investment flows

- How much? What types of investment? What depth? In which building segments?

2. How “transformational” can these NRRPs be?

- Boosting renovation rate and depth
- Address barriers to uptake
- Create enabling conditions



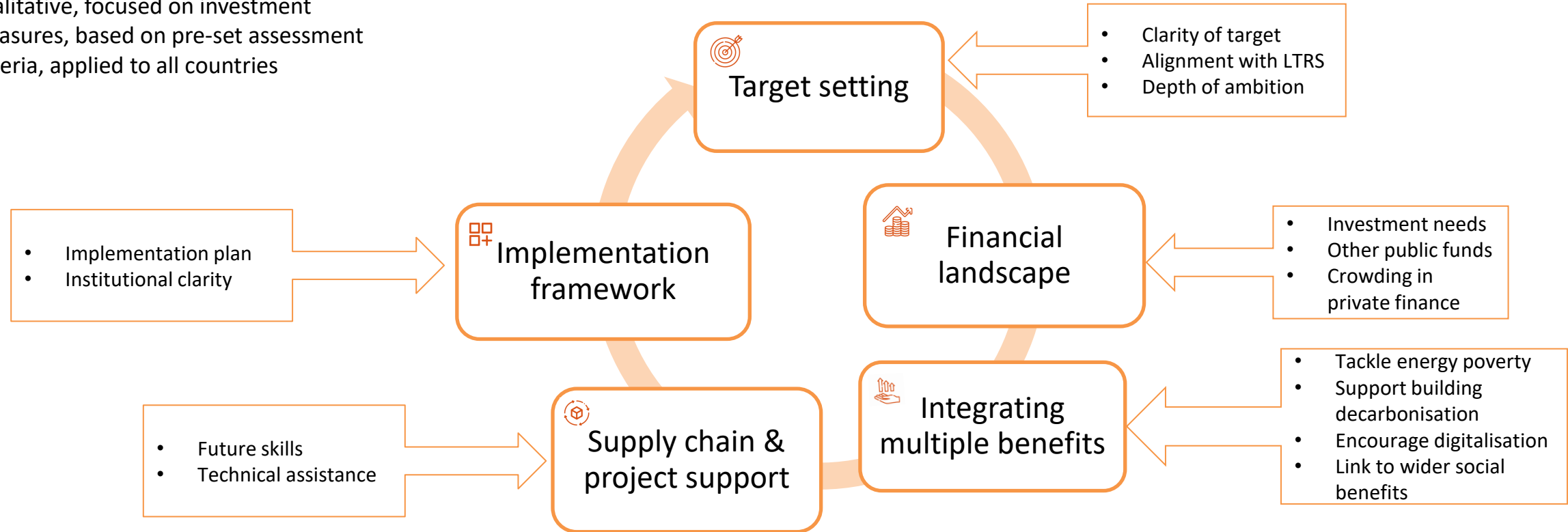
The review of Energy Efficiency Directives, and Energy Performance of Buildings Directives will have a decisive role in driving action and maximizing impact on the ground.



Assessment framework – the criteria

Study basics:

qualitative, focused on investment
measures, based on pre-set assessment
criteria, applied to all countries



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Volume and focus of investment

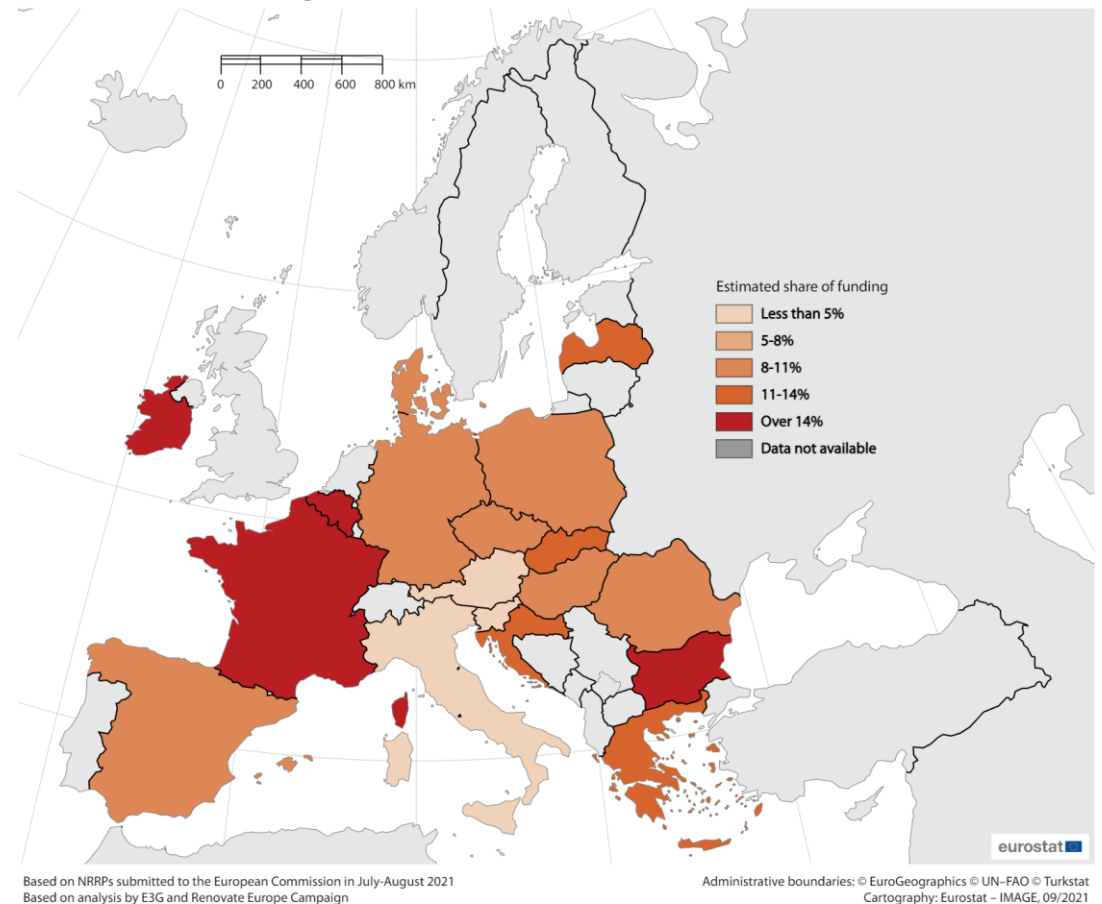
Renovation is a strong feature across plans

- Significant amount of funding allocated: **~€40bn** across 18 Member states.
- Most countries allocate **11-14%**
- **Significant variations:** from €86m in Slovenia and €101m in Austria, to €7.8bn in Spain and €8.6bn in Italy. Per-capita differences too.
- **Residential sector takes the lead:** nearly €22bn (56%) of funding; public sector follows, with €14bn (34%)
- In most cases expected to **deliver at least medium depth renovation**, realising a minimum of 30% primary energy savings.



Funding for buildings energy renovation in NRRPs

Share of total funding, in %



On path to becoming transformational – part 1



- Five countries scoring “strong” demonstrating clear targets, ambition beyond medium depth and LTRS alignment



- Energy poverty acknowledged, but rarely targeted; heat decarbonisation and digitalisation under-explored; wider benefits targeted in public sector (e.g. accessibility, adaptation)



- **Two countries** scoring “strong” for combining public finance alongside clear investment need and private finance understanding



- **Nine out of 18 countries not** addressing technical assistance and/or skills



- **Majority** clear institutional responsibility, can benefit for clearer delivery targets



On path to becoming transformational – part 2

- Strong basis for progress – most frequent score “needs improvement”.

	Clarity and depth of ambition	Financial perspective and landscape	Multiple benefits and integration	Supply chain and project support	Implementation framework
Austria					
Belgium					
Bulgaria					
Croatia					
Czechia					
Denmark					
France					
Germany					
Greece					
Hungary					
Ireland					
Italy					
Latvia					
Poland					
Romania					
Slovakia					
Slovenia					
Spain					

Legend

	transformational
	strong
	needs improvement
	not addressed



Examples of creative and good practices



Social housing energy savings at least 53% (BE)
public sector - at least 50% (IE)



Combining national and NRRP funding (DE); enabling banks and energy service companies to participate (IT)



Adaptation, indoor environment, sustainable material use (CZ)
National Digital Building Register and digital building renovation passports and logbooks (RO); support regeneration and address demographic challenges (ES)



One-stop-shops combining energy efficiency and post-earthquake reconstruction (HR)



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REC/ E3G Study on NRRPs - Recommendations

Criteria	Opportunity for improvement
Clarity and depth of ambition	1. Prioritise deep renovations and scalability in the design and implementation of schemes 2. Accompanying each funded building project with a Renovation Roadmap to 2050
Financial perspective and landscape	3. Improve scheme longevity and impact by crowding in private finance
Multiple benefits and integration	4. Integrate renovation with heat decarbonisation and apply Energy Efficiency First principle consistently 5. Embed renovation alongside wider political and national priorities
Supply chain and project support	6. Strengthen Technical Assistance at regional and local level 7. Fund further One-stop-shops and information centres to support customers, exchange best practice 8. Upskill the workforce through reliable accreditation systems
Implementation framework	9. Better monitoring and aggregation of data to measure impact

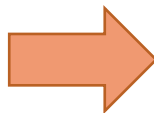
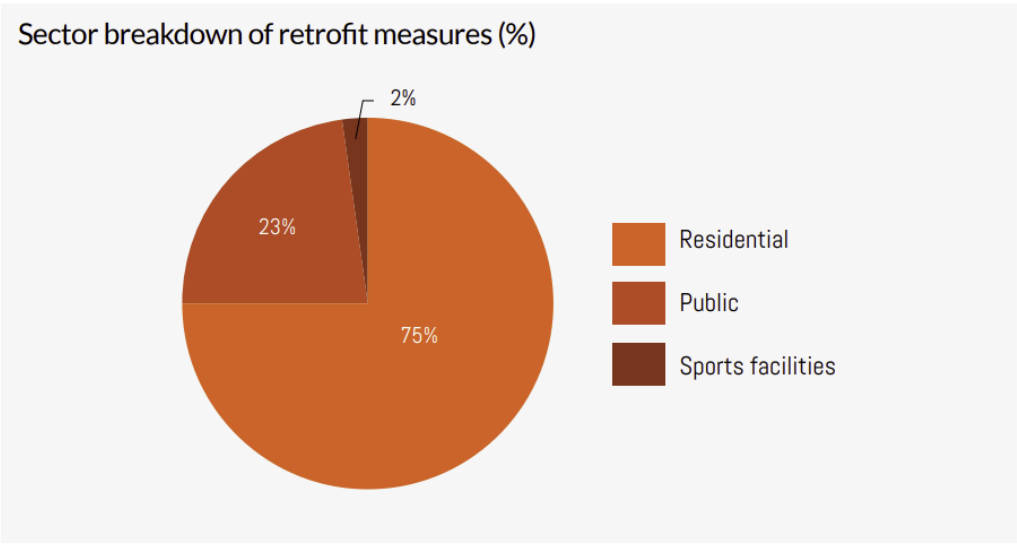
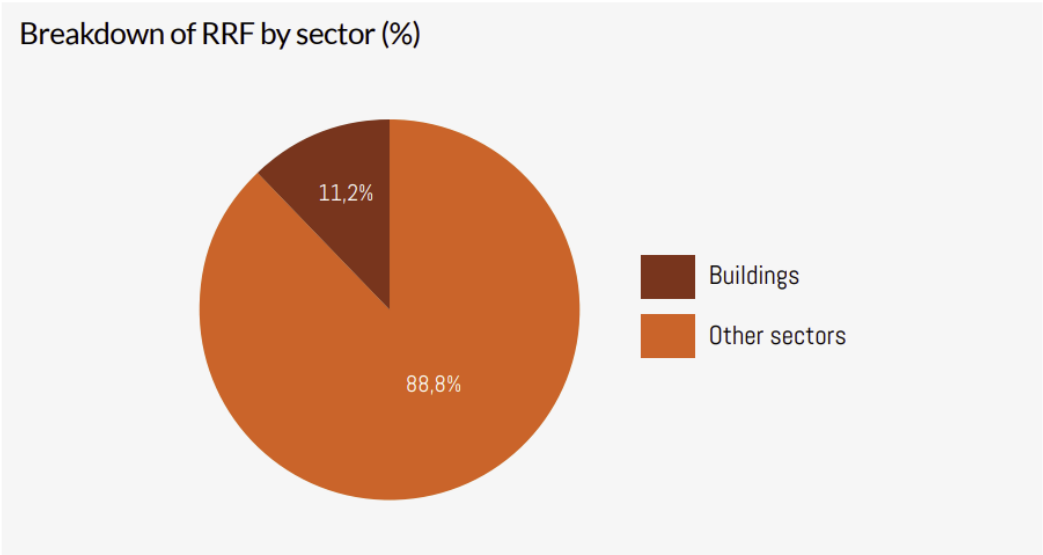


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Country Profile: Spain: Overview



€7.8bn allocated to buildings: second largest in volume, first to gain Commission Approval.

Country Profile: Spain: Challenges

Existing renovation rates

Residential buildings

1.7% per year medium (30 to 60% savings)

0.3% per year deep (> 60% savings)

Non-residential buildings:

2.9% per year medium (30 to 60% savings)

0.5% per year deep (> 60% savings)

Key challenges for acceleration:

- Renovation rate remains lower than necessary for NECP objectives
- Creation of an enabling environment for the growth of the sector is a key challenge

Country Profile: Spain: Strong Points

Clear indication of aims and objectives.

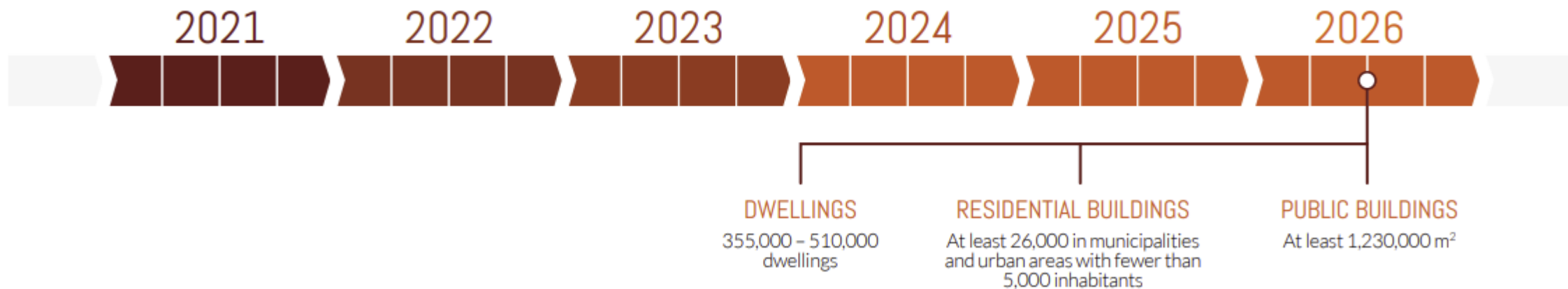
Higher grants for higher savings; higher support for low-income & energy poor households;

Links to accessibility, conservation, urban development

Establishing one stop shops

TRACKING/ TIMELINE TO 2026

The NRRP's 'Component 2 (Renovation)' sets out a range of clear renovation targets to 2026, including for example renovating:



Country Profile: Spain: Recommendations

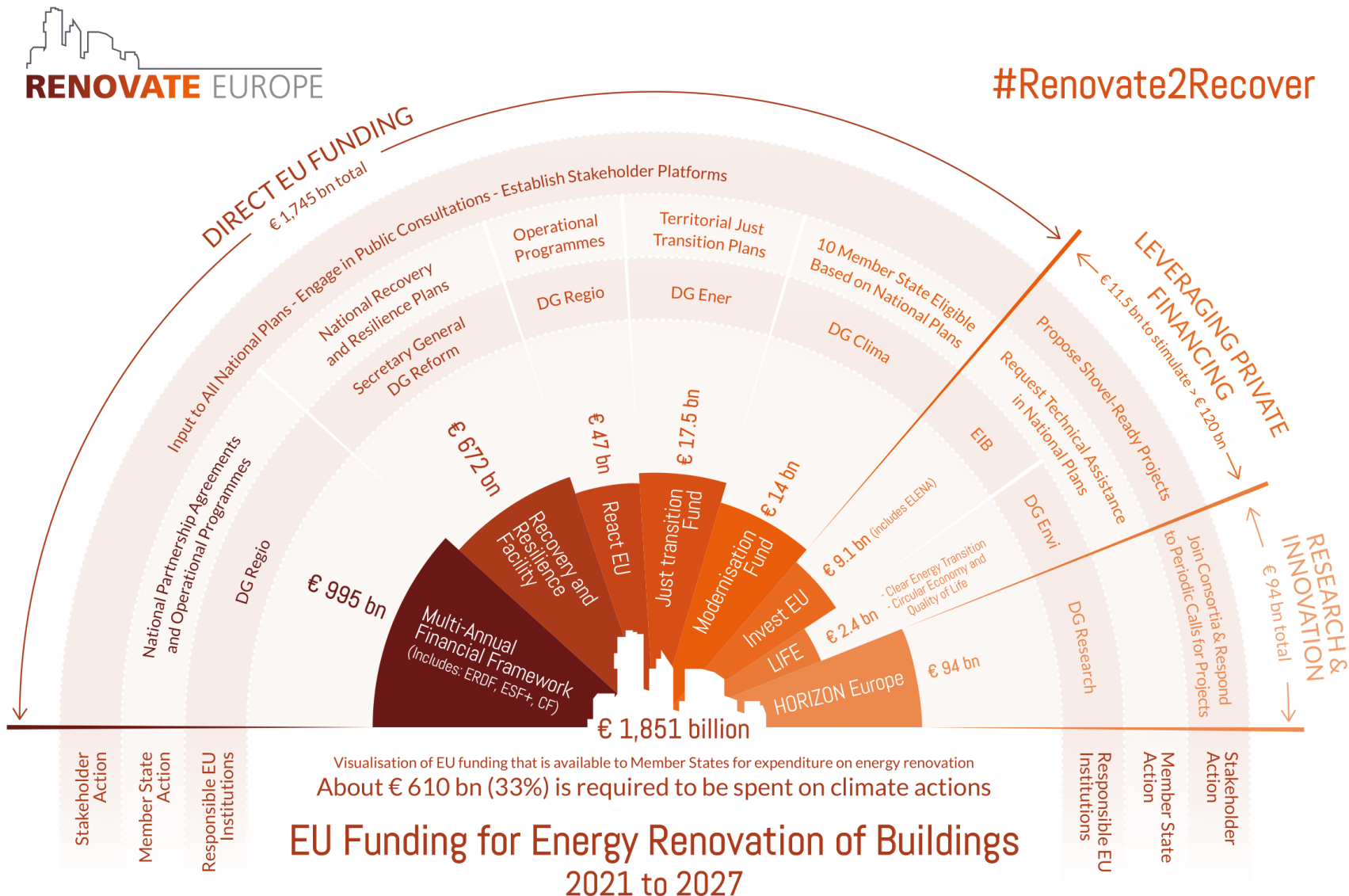
- Introduce intermediate milestones to measure progress regularly, share lessons and facilitate scale-up
- Monitor progress on technical support (one-stop-shops) implementation; support training & upskilling and plan to mainstream building renovation passports
- Leverage plan to increase private finance flows, incentivise end users to engage in projects

Thank you for your attention





Potential EU Funding for Energy Renovation (2021-2027)



[DOWNLOAD](#)