

Welcome!

EuroACE

THE EUROPEAN ALLIANCE OF COMPANIES
FOR ENERGY EFFICIENCY IN BUILDINGS

With the support of:



Opening Addresses



Adrian JOYCE
Secretary General
EuroACE



Henning Ellermann
Head of Energy Efficiency in Buildings
DENEFF

EuroACE:

- ▶ European association bringing **leading companies** involved with the manufacture, distribution and installation of a variety of energy saving products, equipment and services in buildings together

- ▶ We promote **energy efficiency in buildings** on the EU political and regulatory agenda, raise awareness, providing research data and communicating on available solutions and policies

A guide to

THE IMPLEMENTATION OF
THE AMENDED ENERGY
PERFORMANCE
OF BUILDINGS
DIRECTIVE
(EPBD)
2018

Prepared by

Motivation:

We know that improving the energy efficiency of buildings is the most **cost-effective** method of

- Meeting carbon reduction targets
- Creating employment and securing economic growth
- Providing Europeans with comfortable & healthy homes
- Achieving energy security

Members:



More than 200,000 employees and
900 production facilities & office locations in Europe

Cross-sector representation



RENOVATE EUROPE

A Political Communications Campaign with the Ambition to Reduce the Energy Demand of the Building Stock in the EU by 80% by 2050 through legislation and ambitious renovation programmes.

#GreenDeal4Buildings

#PrioritisePeople

EuroACE
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DENEFF
DEUTSCHE
UNTERNEHMENSINITIATIVE
ENERGIEEFFIZIENZ


DEUTSCHER BUNDESTAG



Today's Event:

The European Green Deal and German EPBD Implementation

Moderated by:

Adrian Joyce, Secretary General of EuroACE

- ▶ 10.00-10.20 Welcome Coffee
- ▶ 10.20-10.30 Opening Addresses
- ▶ 10.30-11.20 **Session 1:**
The Green Deal and Stakeholder Engagement in EPBD Implementation
- ▶ 11.20-12.30 **Session 2:**
Tools for Effective Implementation: financing, ambition and quality assurance

- ▶ 12h30-13h30 Lunch

Context:

The European Green Deal:

The backbone of EU policy for the next 5 years

Climate Law will ensure “no way back” from climate neutrality by 2050

Energy Performance of Buildings Directive

Transposition period ends on 10th March

By 2050 the building stock must be “highly energy efficient and decarbonised”

Opening Address



Henning Ellermann
Head of Energy Efficiency in Buildings
DENEFF

Session 1

The Green Deal and Stakeholder Engagement in EPBD Implementation

Pieter de Pous, E3G Berlin Office

An introduction to the European Green Deal

Céline Carre, Saint Gobain

Implications of the European Green deal for Buildings

Panelists:

Henning Ellermann, DENEFF

Volker Weinmann, Daikin Airconditioning Germany

Introduction to European Green Deal



Pieter de Pous
Senior Policy Advisor
E3G Berlin Office



E3G

An introduction to the European Green Deal

Pieter de Pous

22nd January 2020

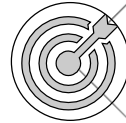


E3G

What is E3G?



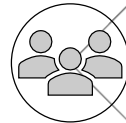
What: E3G is an independent climate change think tank.



Mission: To accelerate the transition to a climate safe world.



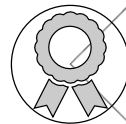
Where: London, Brussels, Berlin, Dublin and Washington D.C. and staff in seven other countries worldwide.



How: We deliver outcomes through coalitions with partners in government, politics, NGOs, science & media.



Funding: Primarily from philanthropic foundations.



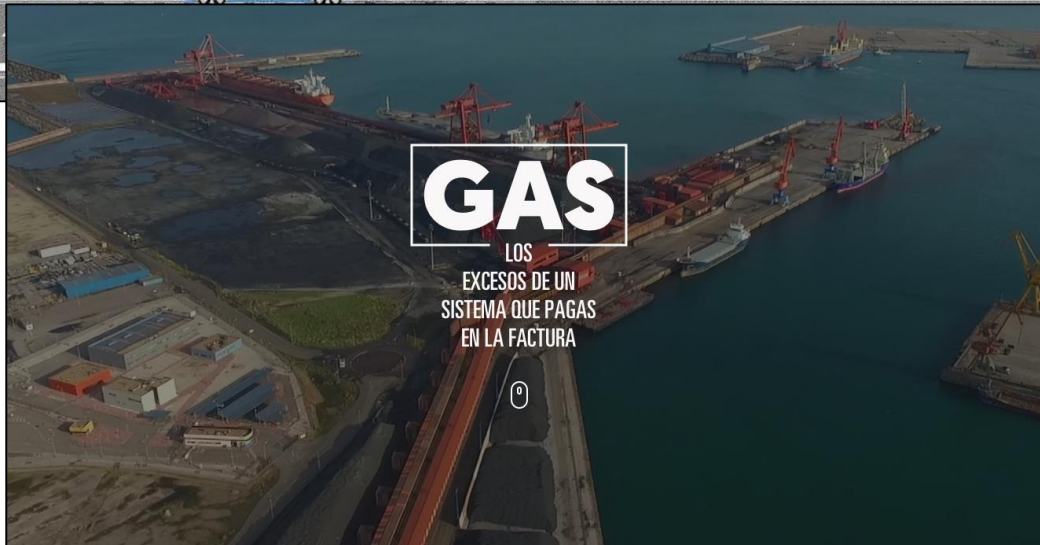
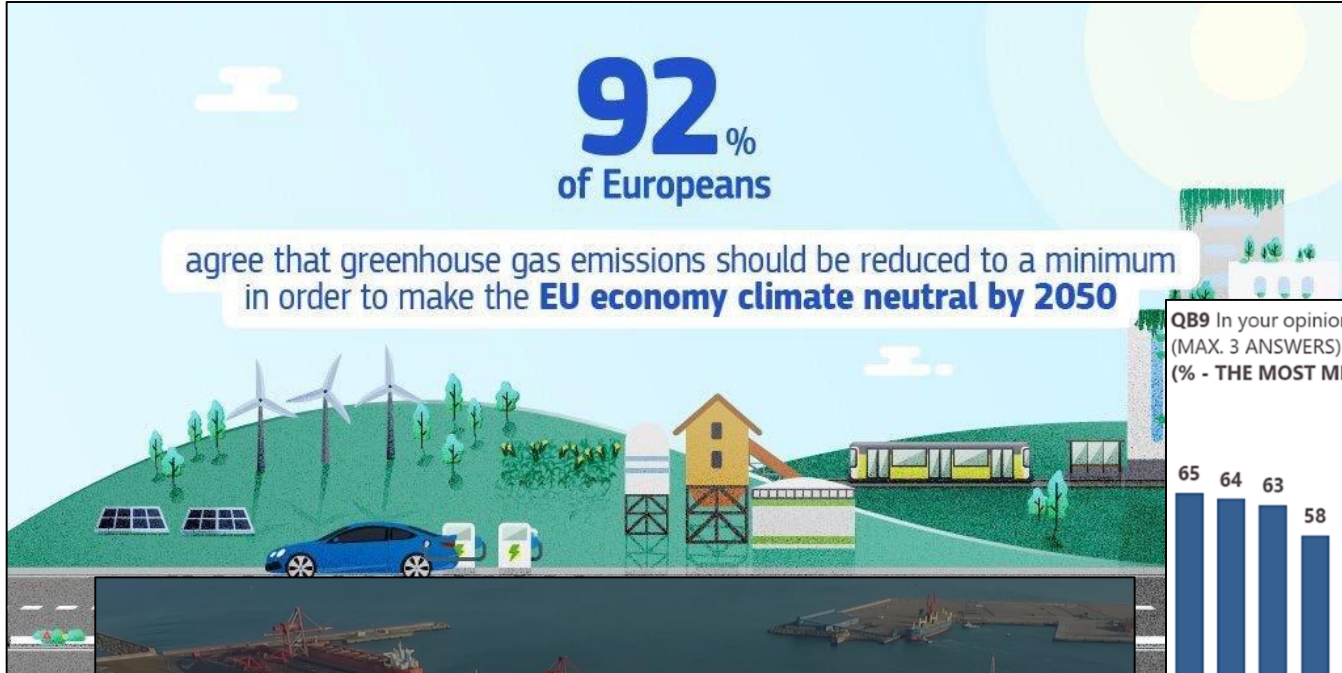
Influence: Ranked 5th most influential environmental policy think tank in the world*.

*In 2018, E3G was ranked the fifth most influential environmental policy think tank in the world for the third year running by the Global Go To Think Tank Index.

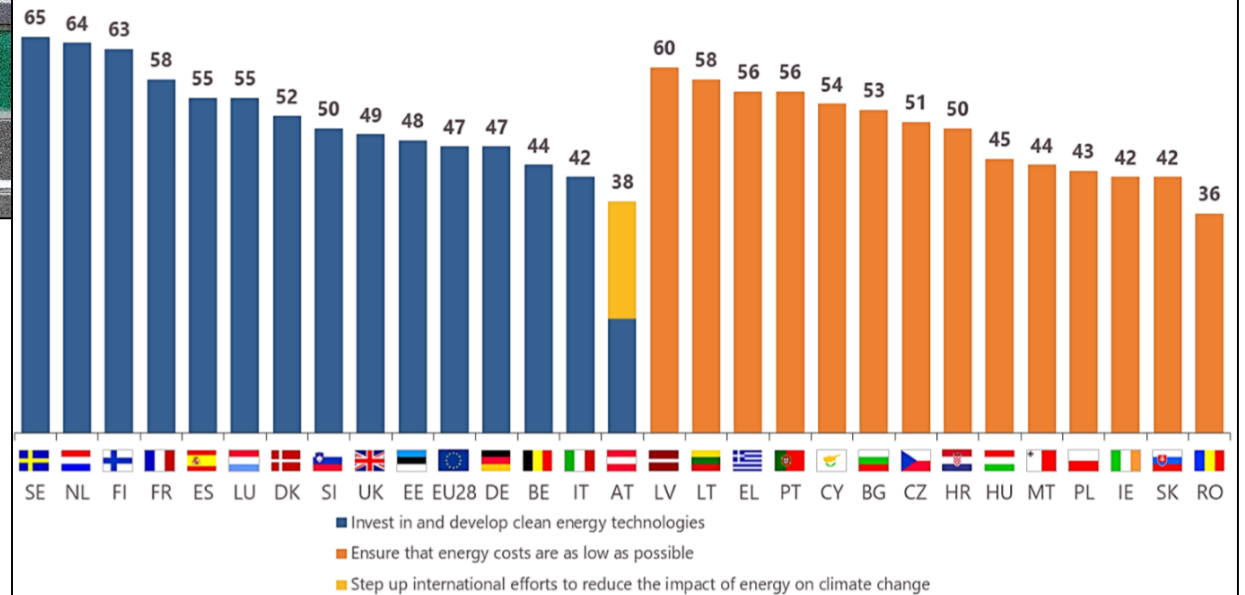
Politics are shifting

92%
of Europeans

agree that greenhouse gas emissions should be reduced to a minimum in order to make the **EU economy climate neutral by 2050**



QB9 In your opinion, which of the following energy issues should the European Union tackle as a priority over the next 10 years?
(MAX. 3 ANSWERS)
(% - THE MOST MENTIONED ANSWER BY COUNTRY)

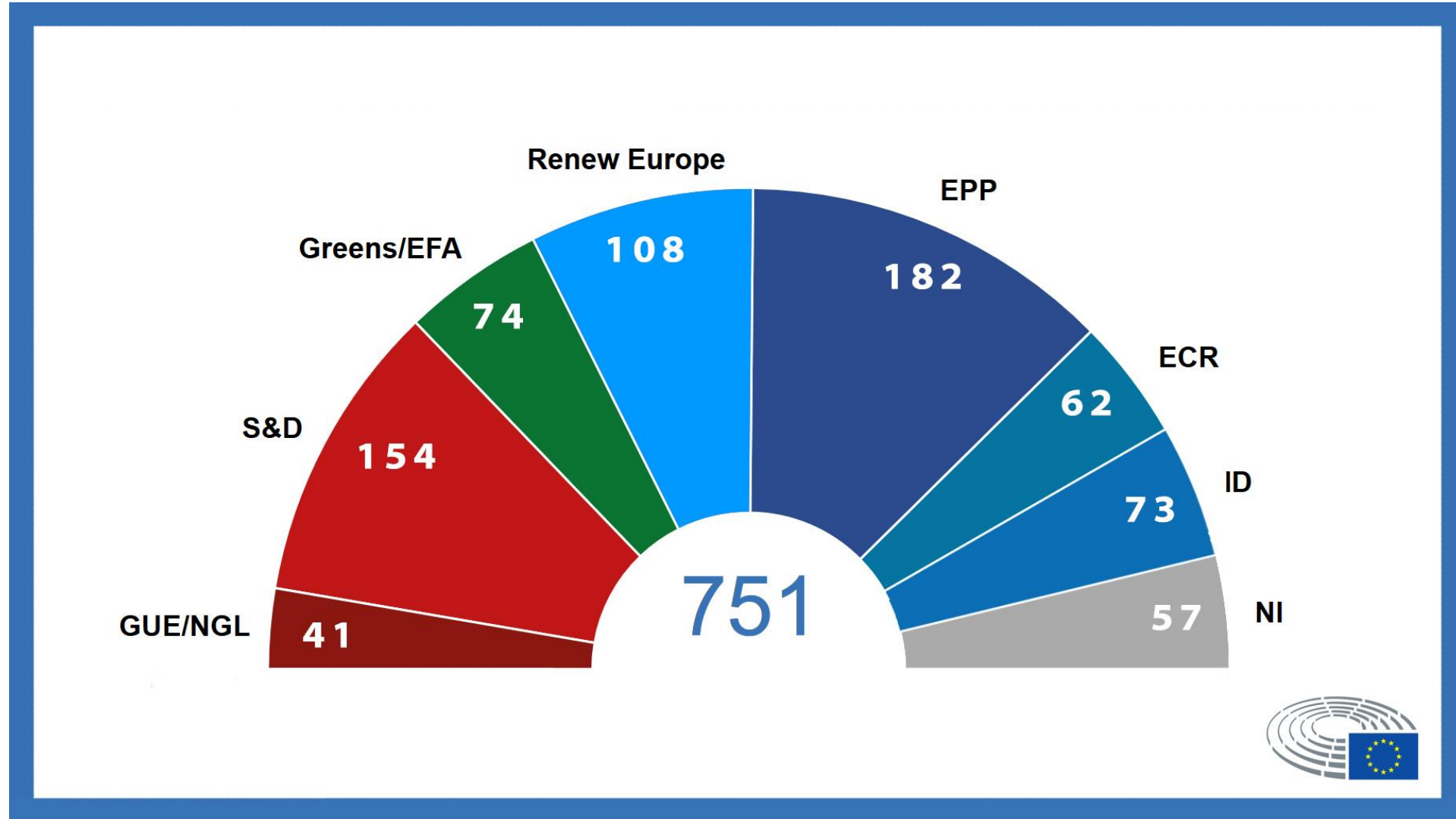


Base: All respondents (n=27,438)



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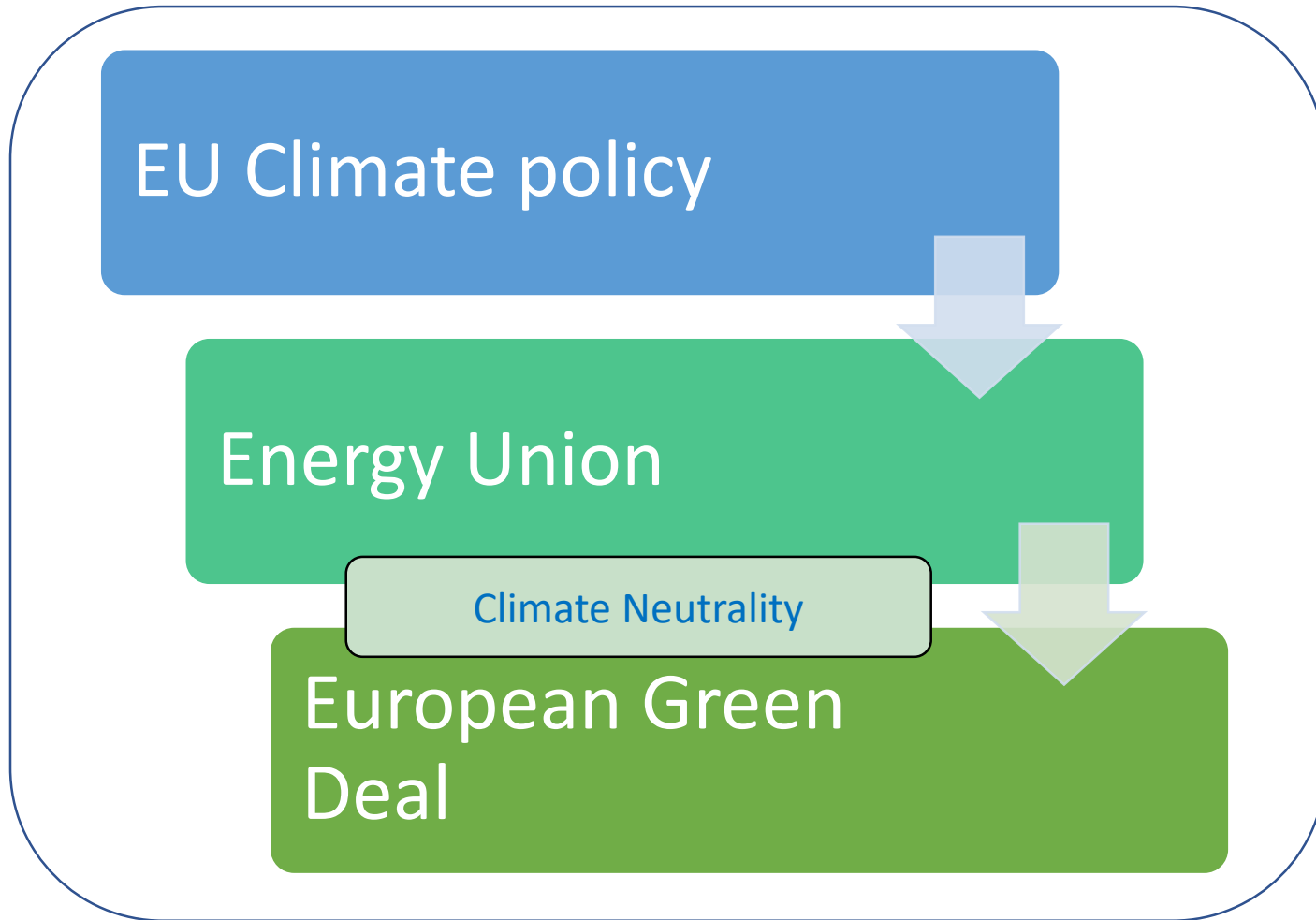
Political groups in the European Parliament



The Energy Union is dead. Long live the European Green Deal!



E3G





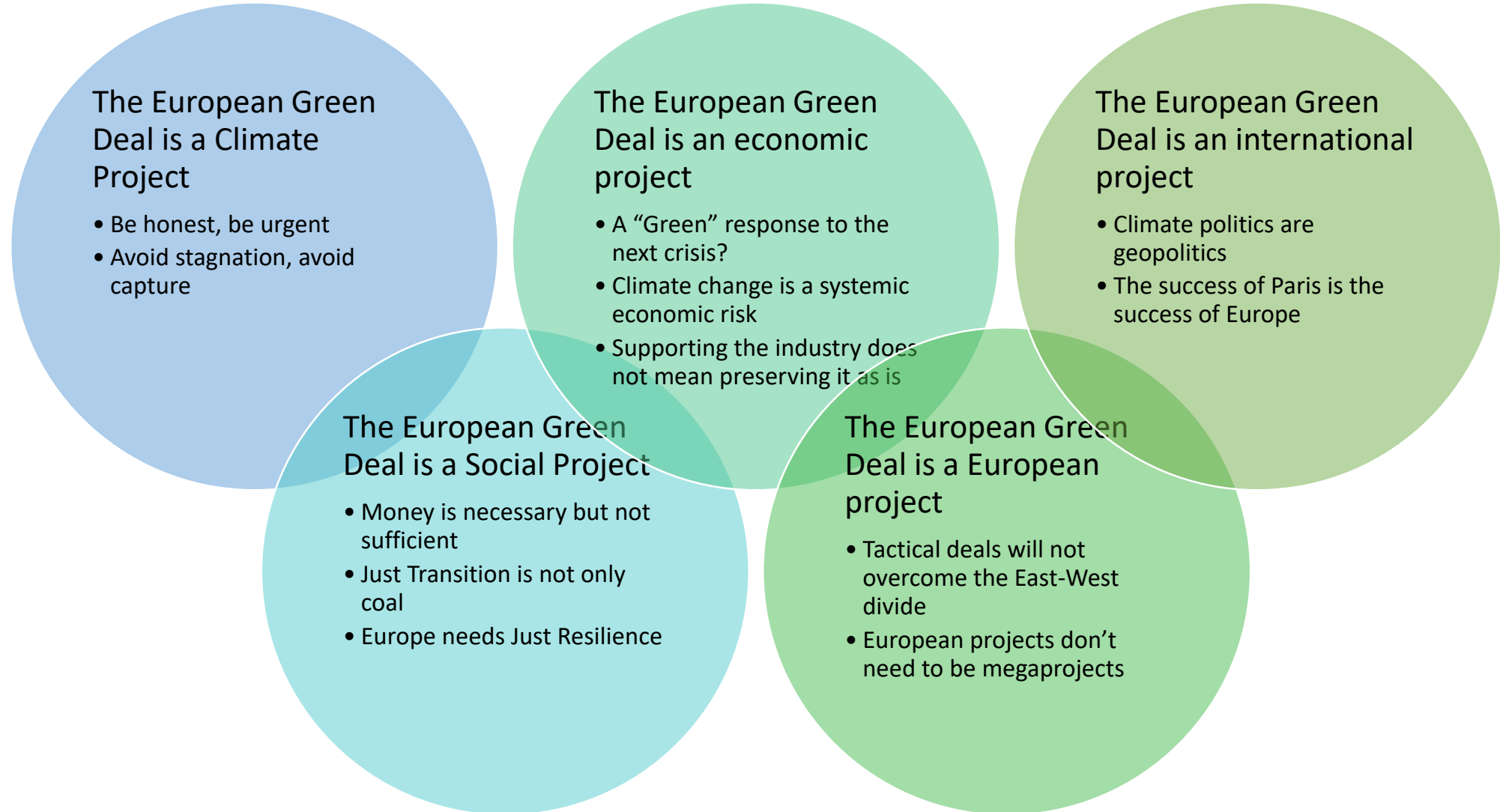
E3G

UVDL's European Green Deal

| | | | | |
|--------------------------------|-----------------------------------|------------------------------|---|--|
| European Climate Law | Emission Trading System extension | Carbon Border Tax | Energy Taxation Directive review | Industrial and Innovation Strategy |
| Just Transition Fund | European Climate Pact | Strategy for Green Financing | Sustainable Europe Investment Plan and EIB reform | Increase the EU target for 2030 to 55% and lead international negotiations |
| Biodiversity Strategy for 2030 | "Farm to Fork" Strategy | Zero pollution strategy | New Circular Economy Action Plan and Single Use Plastics Strategy | Conference on the Future of Europe |



Proposal for a European Green Deal





E3G

About E3G

E3G is an independent climate change think tank accelerating the transition to a climate safe world.


E3G builds cross-sectoral coalitions to achieve carefully defined outcomes, chosen for their capacity to leverage change. E3G works closely with like-minded partners in government, politics, business, civil society, science, the media, public interest foundations and elsewhere. In 2018, for the third year running, E3G was ranked the fifth most globally influential environmental think tank.

More information is available at www.e3g.org

Implications of the EGD for EE in Buildings



Céline Carré
Head of Public Affairs
Saint Gobain



IMPLICATIONS OF THE EUROPEAN GREEN DEAL FOR ENERGY EFFICIENCY IN BUILDINGS

*Céline Carré –
Head of Public Affairs*

*Berlin
22 January 2020*



SAINT-GOBAIN

A STRONG GLOBAL GROUP – OVER 80% TURNOVER IN CONSTRUCTION

OPERATING IN

68

COUNTRIES

MORE THAN

180000

EMPLOYEES



around **1000**

MANUFACTURING

FACILITIES

CREATED MORE THAN

350

YEARS AGO



MAIN CONSTRUCTION BRANDS



2018 SALES

€41.8BN

ABOUT

3700

RESEARCHERS IN 8
CENTERS

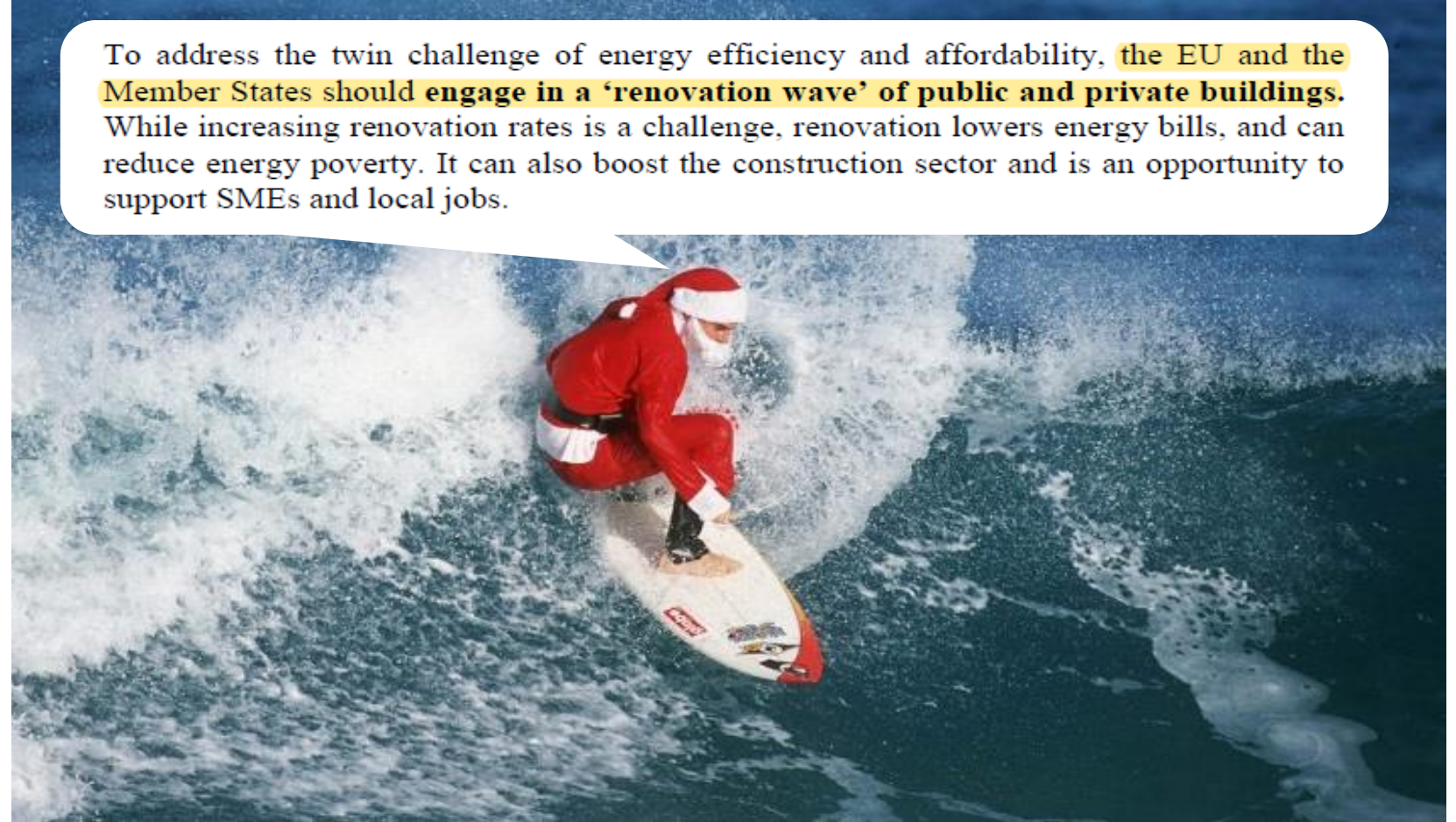
1 in 4

PRODUCTS SOLD
DID NOT EXIST
5 YEARS AGO

THE EU IS ON A MISSION TO CREATE A « RENOVATION WAVE »



To address the twin challenge of energy efficiency and affordability, the EU and the Member States should engage in a 'renovation wave' of public and private buildings. While increasing renovation rates is a challenge, renovation lowers energy bills, and can reduce energy poverty. It can also boost the construction sector and is an opportunity to support SMEs and local jobs.



Green Deal came like a Christmas present. How big is it?

THIS IS THE WAVE, SO FAR...



Better energy performance of buildings

- Prices of different energy sources should incentivise **energy-efficient buildings**
- Design of buildings should be in line with the **circular economy**
- Increased **digitalisation**
- More **climate-proofing** of buildings
- Strict enforcement of rules on **energy performance of buildings**

Renovate **social housing, schools and hospitals**

Particular attention will be paid to the renovation of social housing, to help households who struggle to pay their energy bills.

Leave no one behind

Help the **50 million** consumers to keep their homes warm

New renovation initiative in 2020

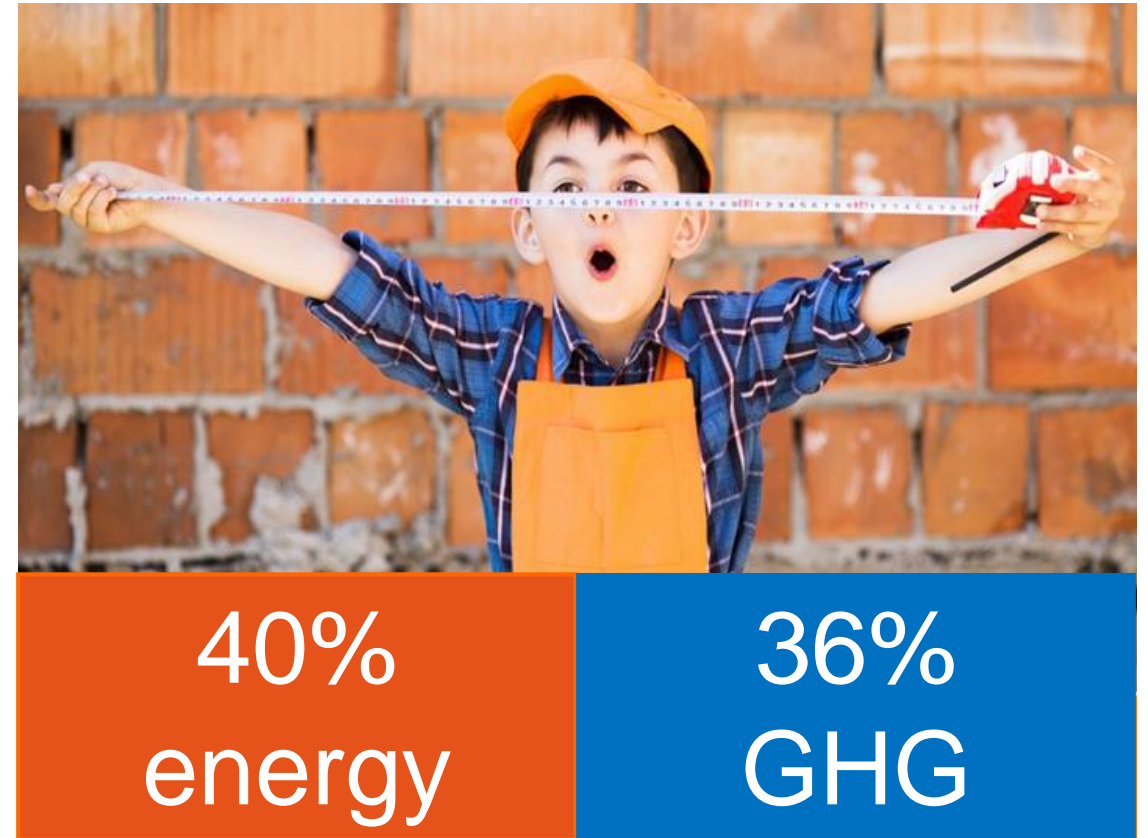
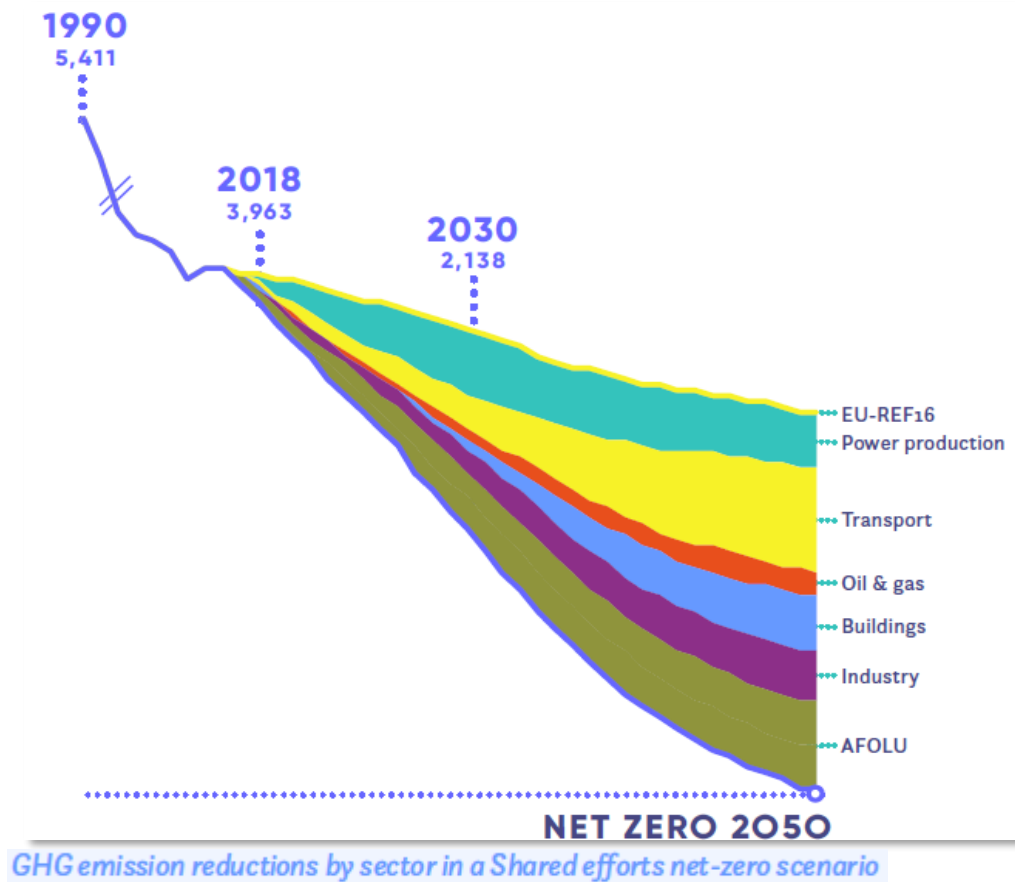
The Commission will launch an open platform bringing together the buildings and construction sector, architects and engineers and local authorities to:

- Develop innovative financing possibilities
- Promote energy efficiency investments in buildings
- Pool renovation efforts into large blocks to benefit from economies of scale



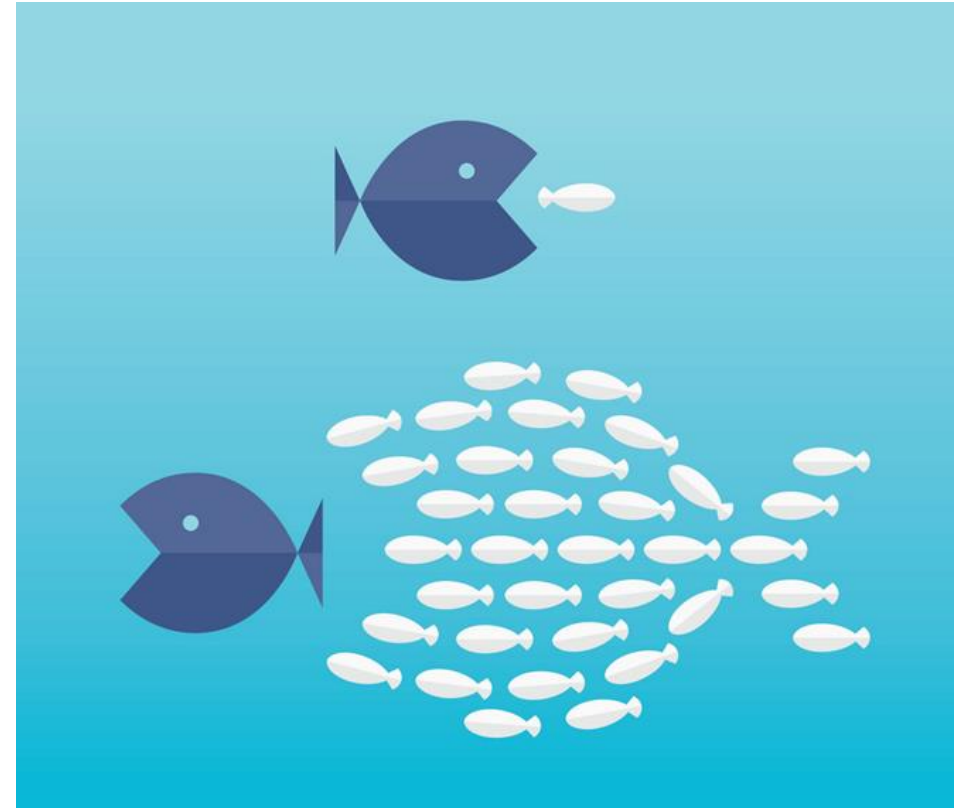
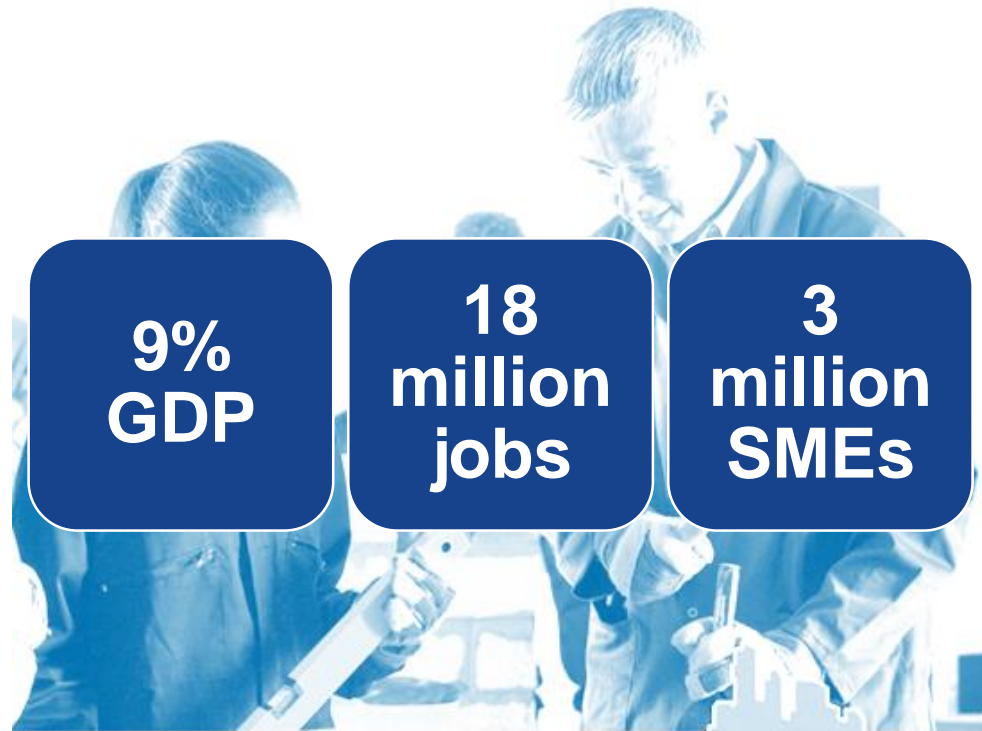
Does this really make a wave ?

THE TASK IS QUITE CLEAR



Buildings are key to drive decarbonisation. The challenge is BIG.

WHAT ABOUT THE CONSTRUCTION SECTOR ?



A big asset for the EU economy. But made of small fishes.

THE CURRENT OUTLOOK IS PRETTY FLAT



- Max 1% renovation rate
- 9% average savings (res.)
- Fragile political will
- Stop & go programmes
- Unclear strategies
- Lack of skills / coordination
- Projects too small
- Mismatch finance vs projects

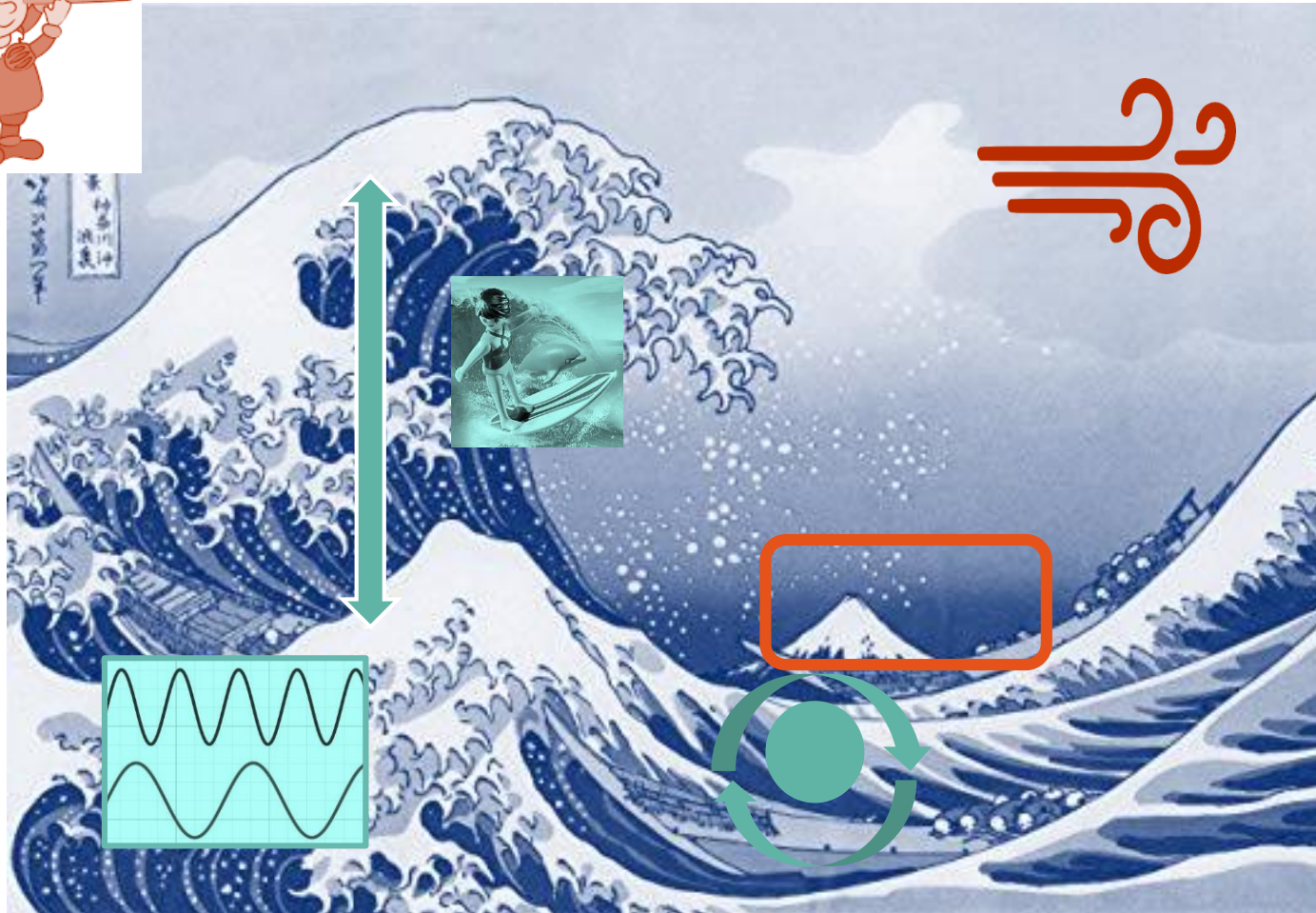
Not a breeze of wind. Who wants to set sail ?

IS THE CURRENT LANDSCAPE ATTRACTIVE FOR CONSUMERS ?



When dreaming of it, it looks still too scary. So we don't go.

THE RENOVATION WAVE(S) AND THE SEA WE WANT



Our WAVES will need

1. Amplitude
2. Frequency
3. Velocity
4. Continuity

DEPTH

RATE

EASY

SCALING

Our dream SEA will need

1. A clear horizon
2. Various currents
3. Wind
4. Islands

GOALS

SEGMENTS

FINANCE

SUPPORT



WHAT WILL MAKE US SET SAIL ?

1. Clear horizon & strategy

- 2050 objectives (2030/2040)
- Energy Efficiency First (EE1)
- Long term strategies
- Carrots & Sticks
- Trigger points – EPBD
- Min. performance requirements

2. Favoring « currents » for any building

- Segment specific policies
- Worst performing buildings first
- Exemplary wave : public buildings (art 5 EED)
- Leverage data / mapping / solutions
- Take best-practice sharing "to the moon"
- Build "ecosystem" for scaling up

3. Easy & efficient renovation

- Empower professionals (architects, installers,...)
- Team coordination & skills (Platforms)
- Integrate passive & active solutions
- Building Renovation Passport
- Efficiency / industrialised renovation
- City / district approach (link EE1)

4. Affordable & valuable

- Simple & stable subsidy schemes
- Tailored schemes (vulnerable / able to pay)
- Reward EE ambition
- Pooling MFF; EIB InvestEU; Just Transition...
- *Other ideas* : Leverage use of ETS money; mainstream green mortgages; Eurostat note

Renovating, like sailing, involves preparedness.
Synchronising the mix of tools is the priority.

TO CONCLUDE ...



« *No wind blows in favour of a ship without direction* ». Seneca

THANK YOU FOR YOUR ATTENTION

Session 1: Panel Debate



Pieter de Pous
E3G Berlin Office



Céline Carré
Saint Gobain



Henning Ellermann
DENEFF



Volker Weinmann
Daikin Airconditioning Germany

Session 2

Tools for Effective Implementation: Financing, Ambition and Quality Assurance

Murray Birt, DWS

Investor Perspective on Advancing Energy Efficiency in Germany

Prof. Andreas Holm, FIW Munich

Strategy for Renovation: How deep should we go?

Panelists:

Sune Tobias Grollov, VELUX

Dr. Thomas Engelke, vzbv

Investor Perspective on Advancing EE in Germany*



Murray Birt
Senior ESG Strategist
DWS UK Office

*Due to regulatory restrictions, the DWS presentation cannot be published online but if you are interested in further information about the presentation, please contact murray.birt@dws.com

Strategy for Renovation: How Deep Should we go?



Prof. Andreas Holm
FIW Munich

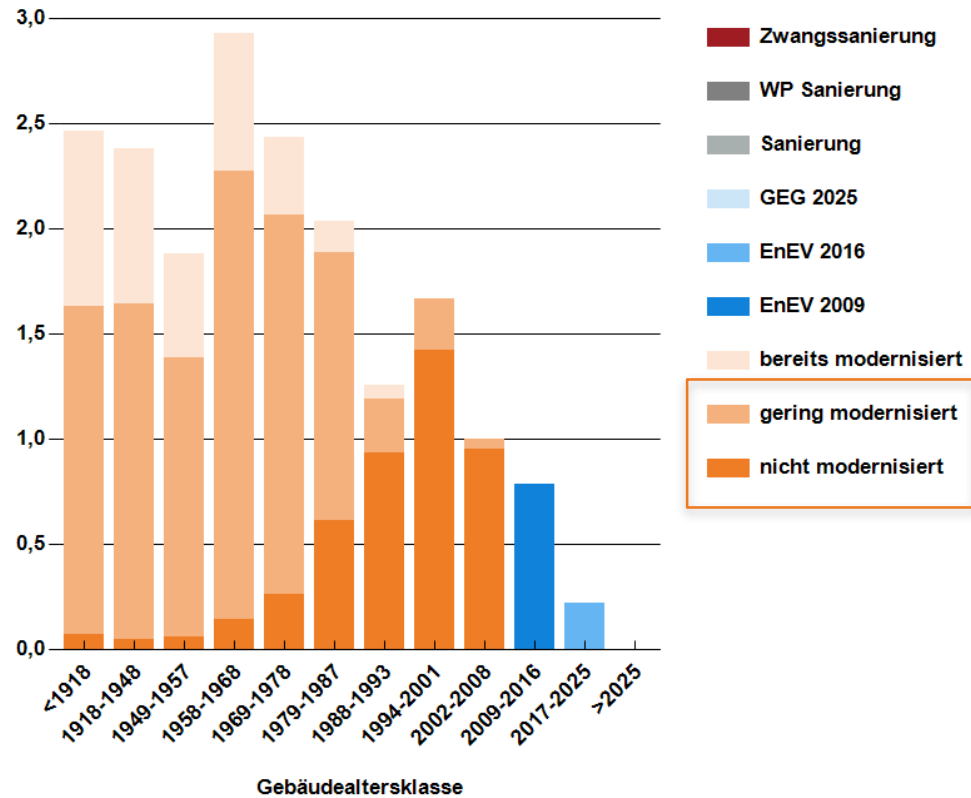
Strategy for Renovation: how deep should we go?

Andreas H. Holm

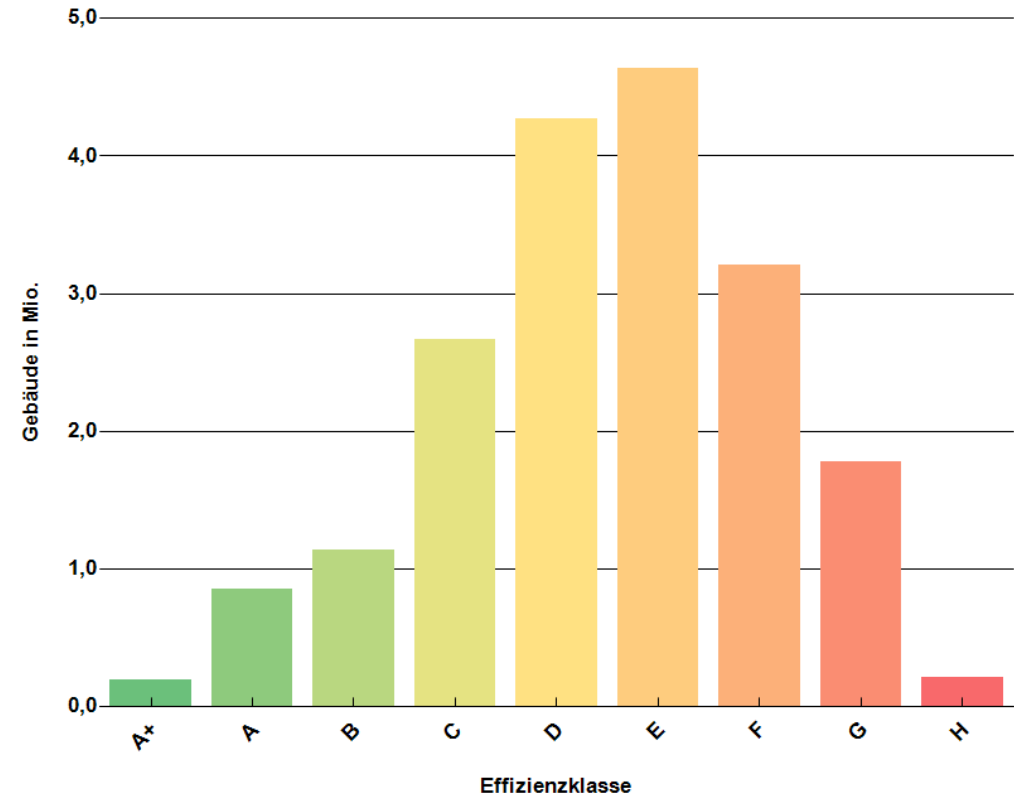


Building Stock

Retrofitting Status



Efficiency Class



today

Black Box

2050

The road to success

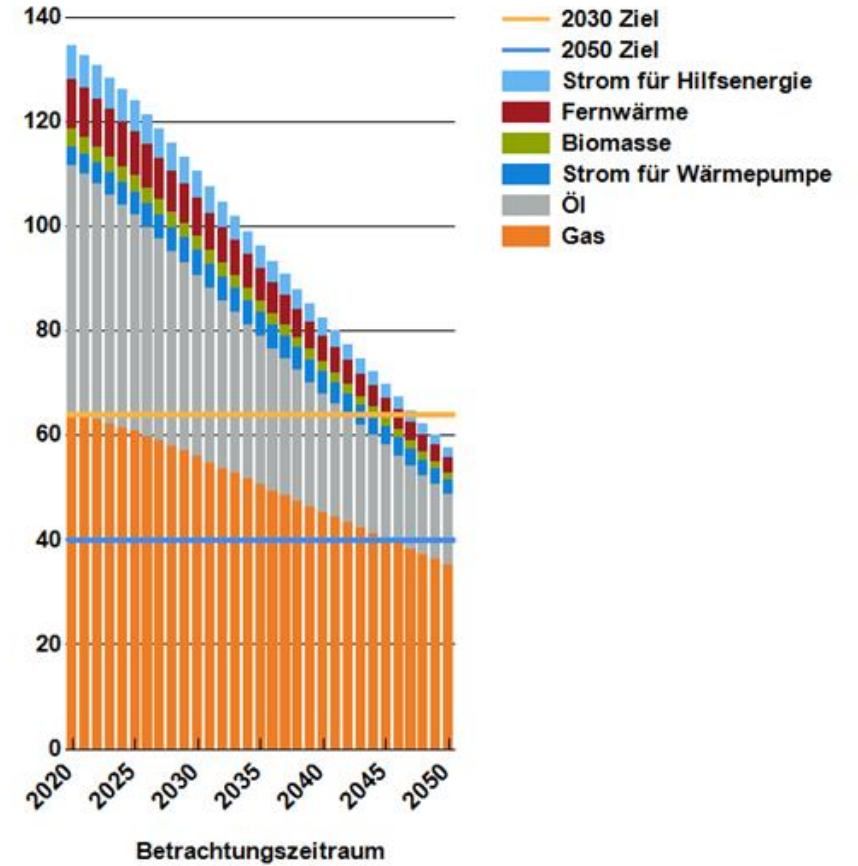
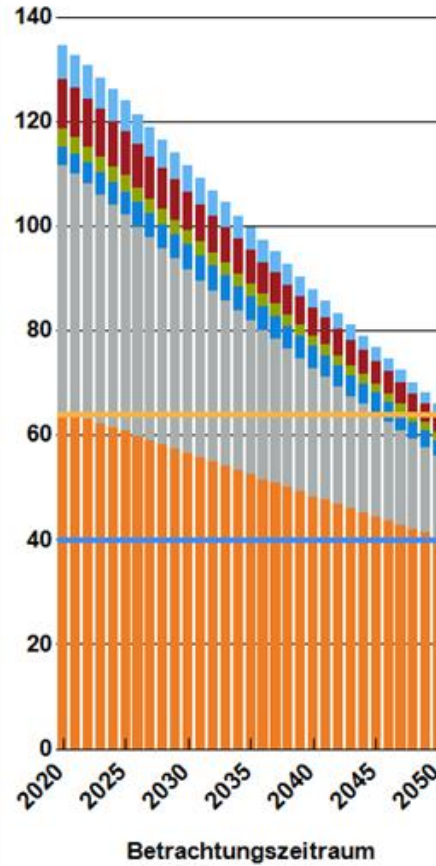
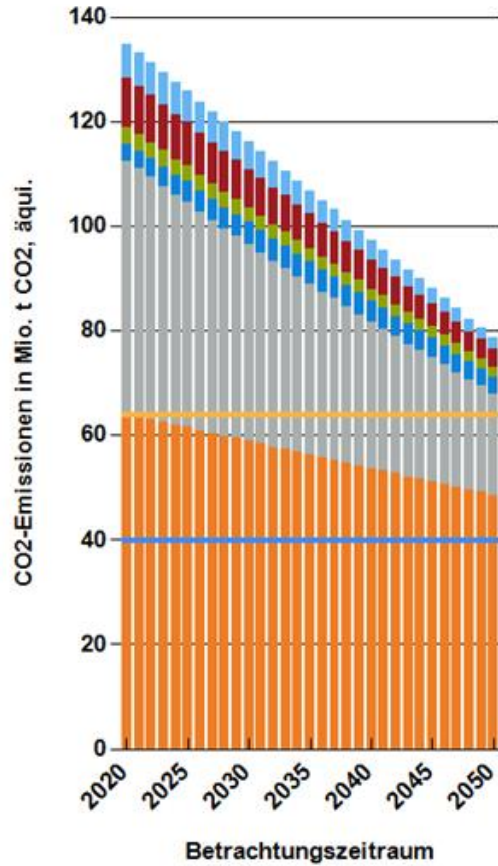


CO2-Emissions

BAU (0.8 % p.a.)

1.6 % p.a.

2.4 % p.a.

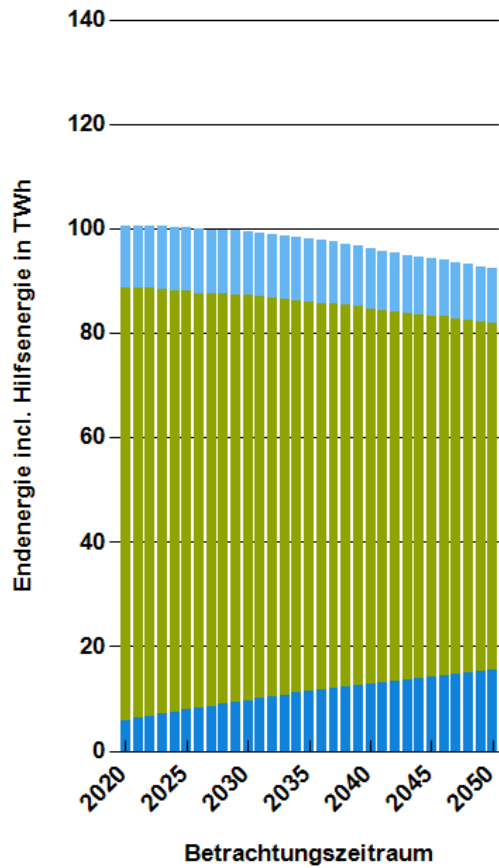


The road to success

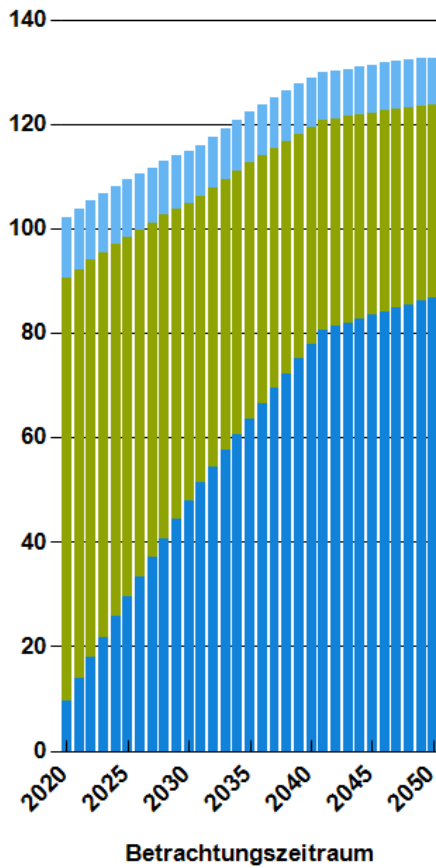


Final energy demand from renewable resources

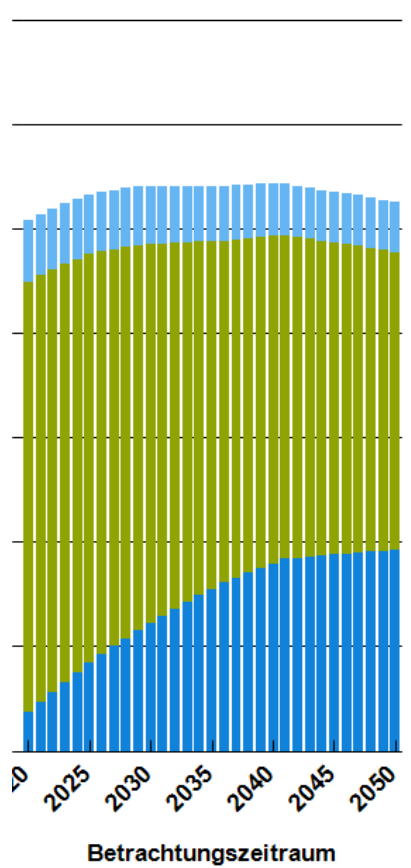
BAU



All-Electric



Technolog Mix



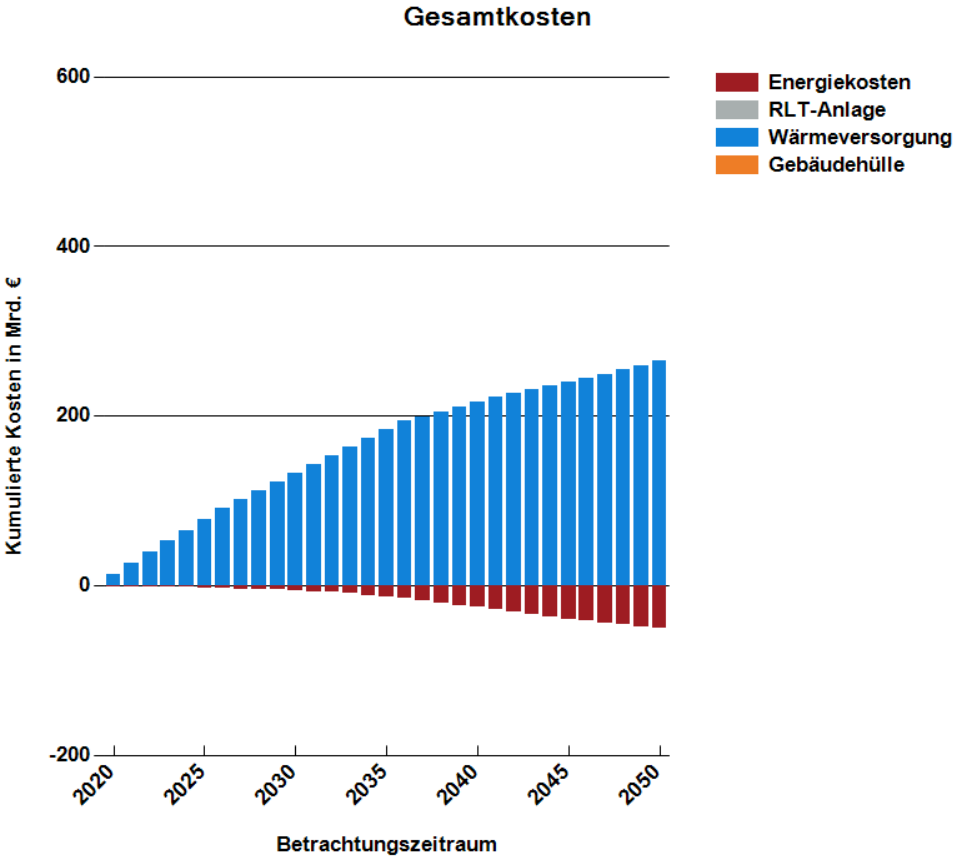
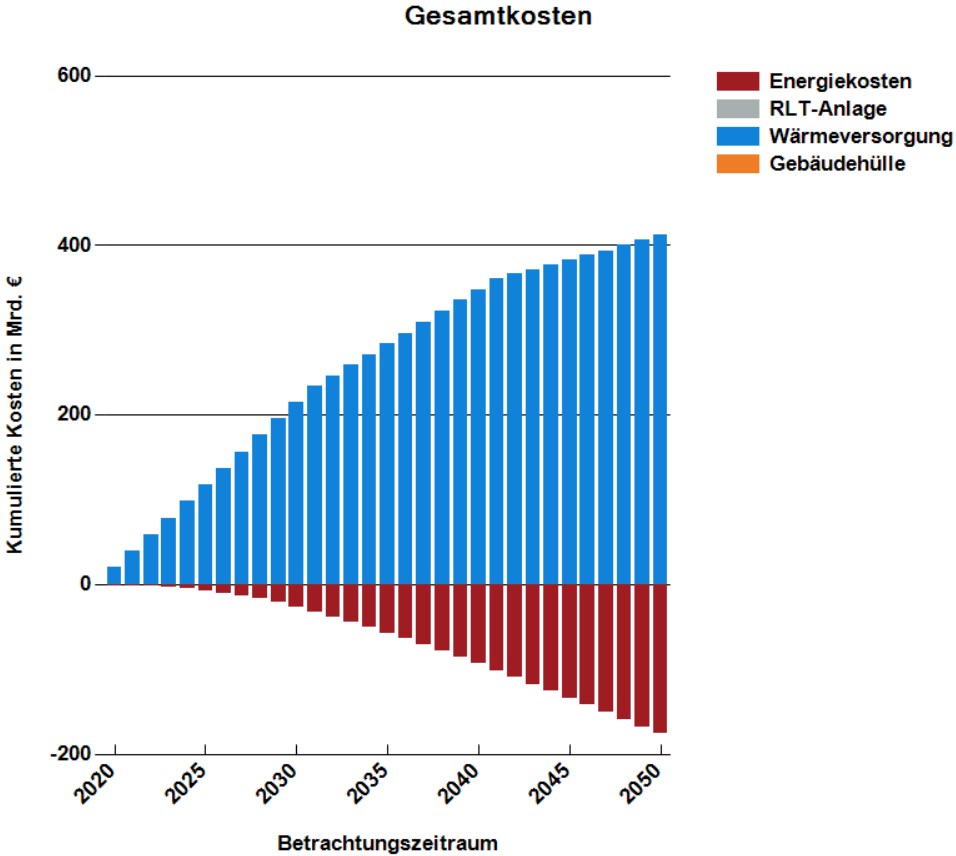
- Strom für Hilfsenergie
- Fernwärme
- Bio
- Strom für Wärmep
- Öl
- Gas

Accumulated additional costs compared to BAU



All-Electric

Technology Mix



The road to success



A diagram showing a horizontal grey bar representing a beam. A blue arrow points downwards from the top of the bar on the left side.

better U-values

A diagram showing a horizontal grey bar representing a beam. A blue arrow points upwards from the bottom of the bar on the right side.

more houses

- Energy Code

- EH 100
- EH 70
- EH 55
- EH 40

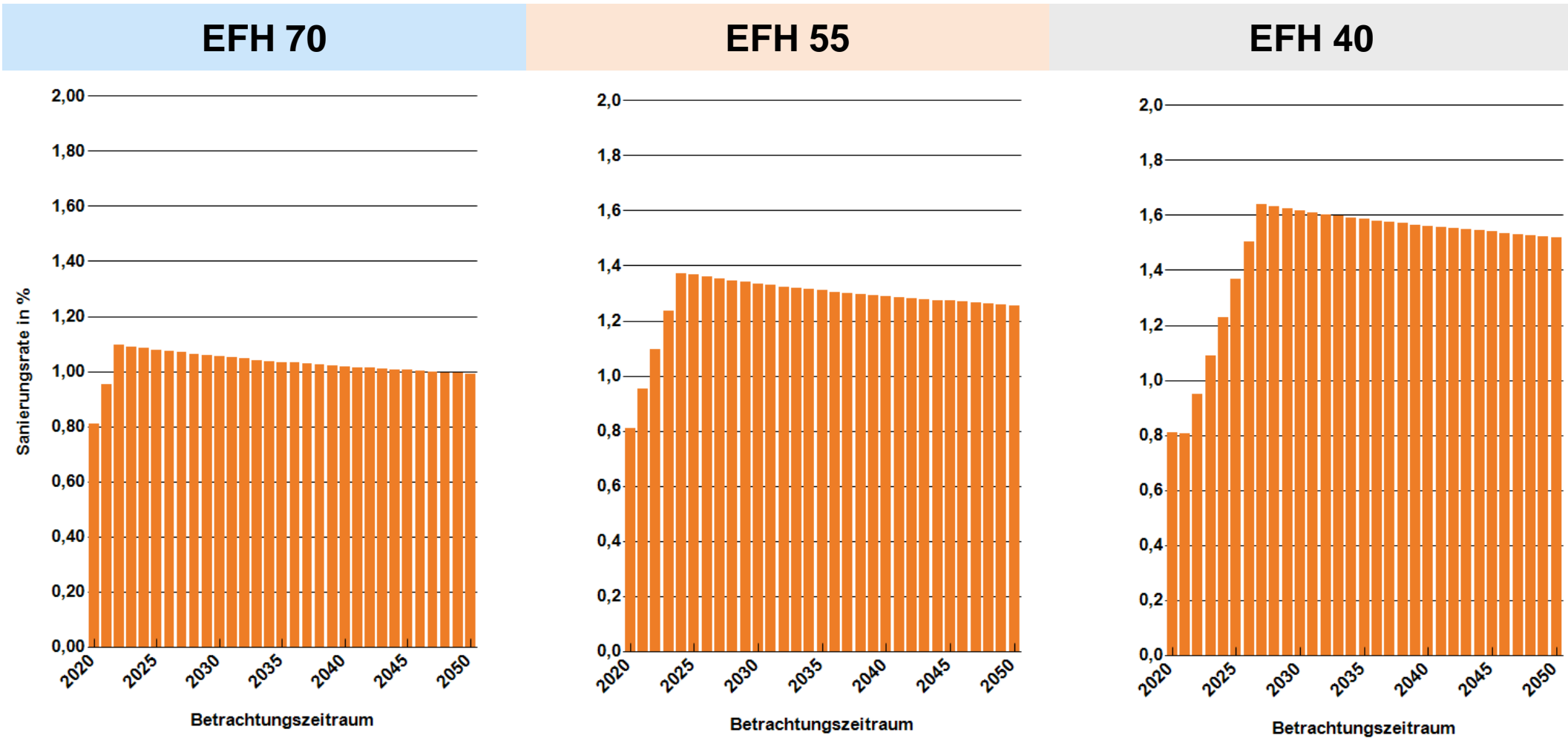
better U-values

more houses

- Retrofitting rate

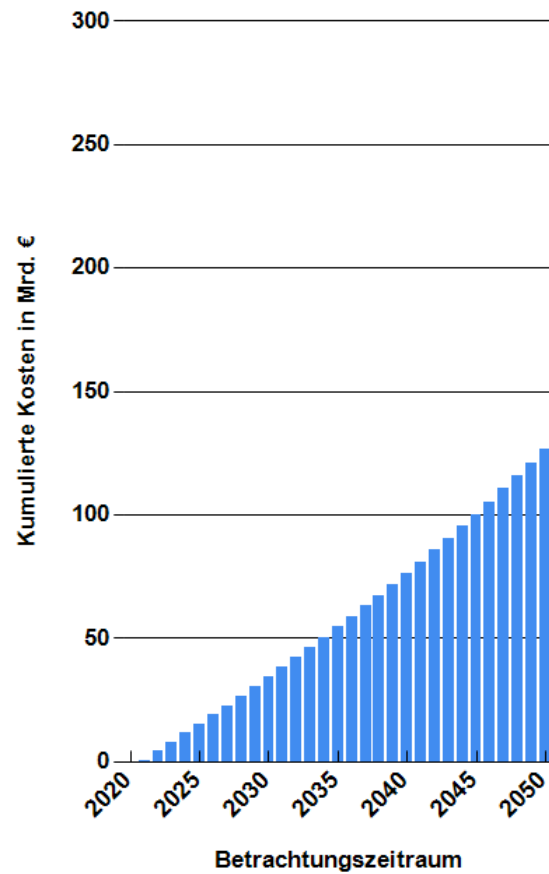
- 1 % p.a.
- 2 % p.a.
- 3 % p.a.

Necessary retrofitting rate in order to compensate

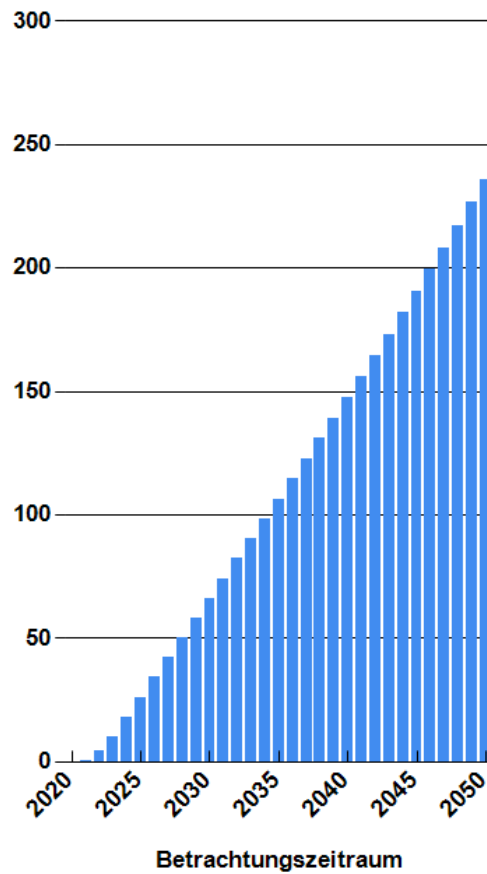


Accumulated additional costs

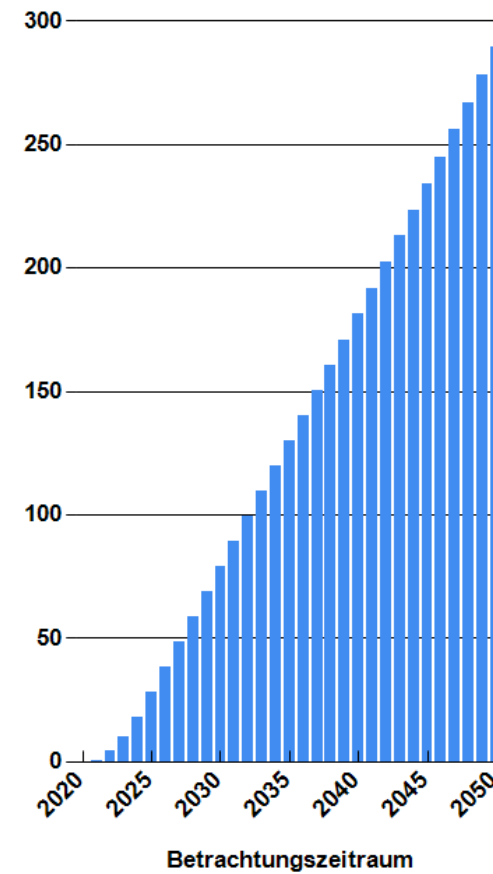
EFH 70

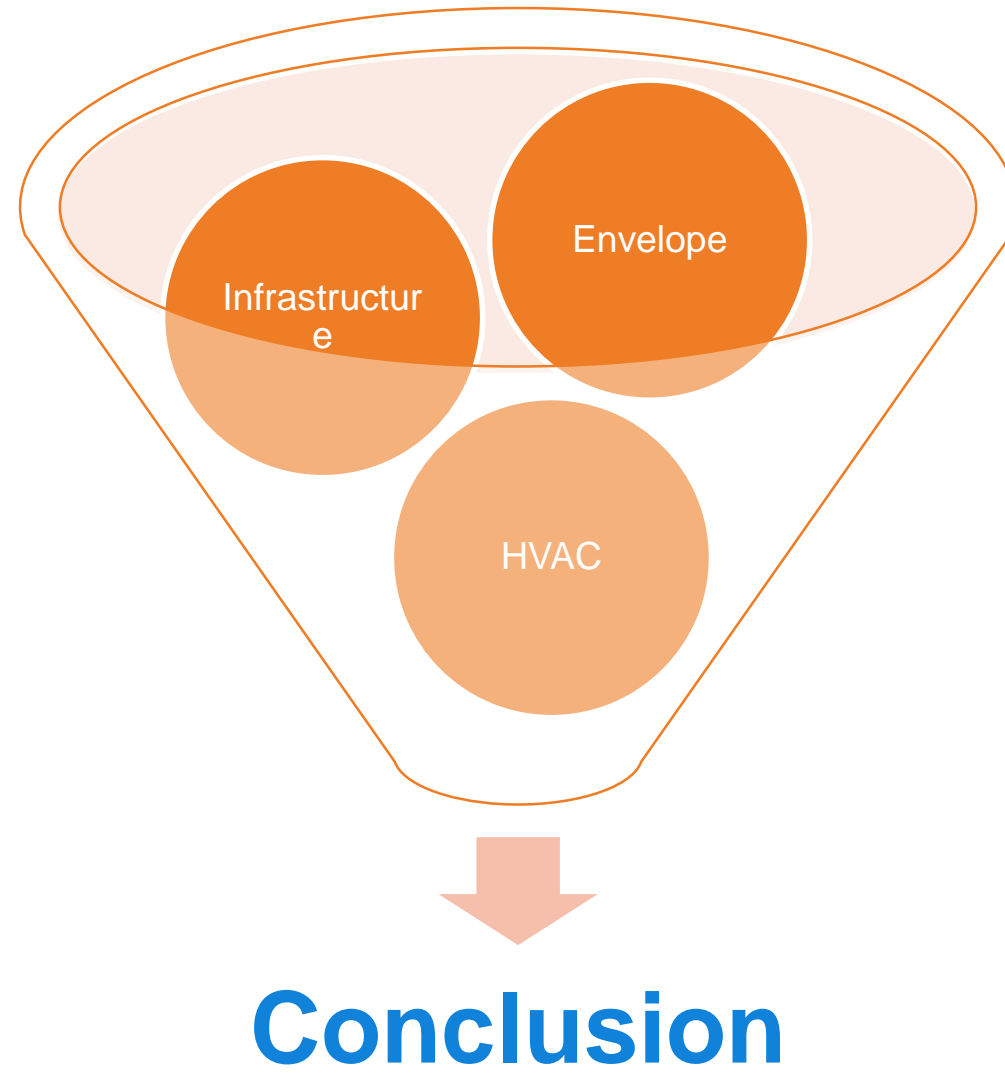


EFH 55



EFH 40





CO₂ - Reduction

Energy efficiency

Session 2: Panel Debate



Murray Birt
DWS UK Office



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FIW Munich



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