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**Promotion of smart and integrated NZEB renovation
measures in the European renovation market
(NeZeR)**

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Roadmap for NZEBR and RES in all participating countries

Executive Summary

28/02/2017

IVL

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The NeZeR project promotes the implementation and smart integration of Nearly Zero Energy Building Renovation (NZEBR) measures and the deployment of Renewable Energy Sources (RES) in the European renovation market. The scope of NeZeR is in urban residential houses and dwellings and the aim of the project is to make NZEBR the prevailing means for refurbishment.

This executive summary comprises the outcome of the national roadmaps created in each participating country (Finland, Netherlands, Sweden, Spain and Romania). The roadmaps have been drawn, on a national level. Generally, a roadmap can be described as a strategic plan that describes the steps needed to achieve stated outcomes and goals. In this project it includes tasks and priorities for action and suggestion of metrics that allow the tracking of the progress towards the final goals. The tracking process will occur after finalizing the NeZeR-project.

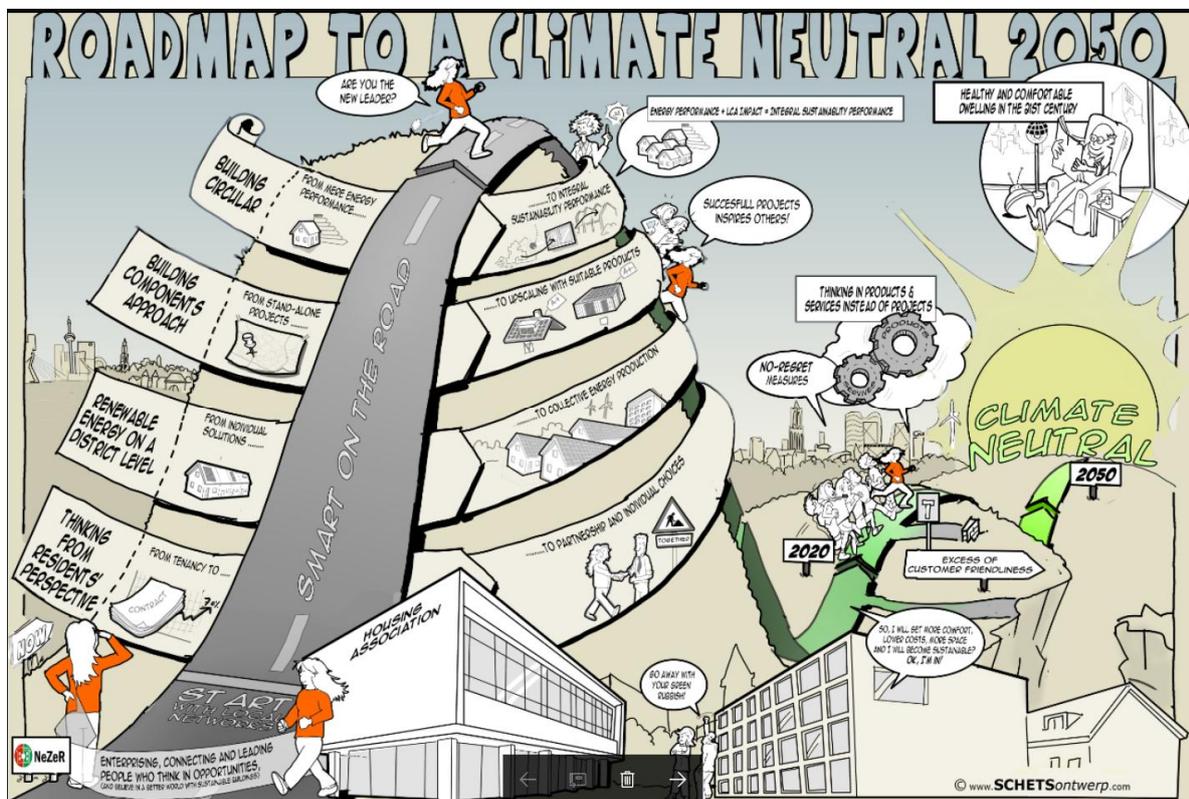


Figure 1: Visualisation of the roadmap, with a focus on the role for social housing associations. Example from the Dutch roadmap report.

The stakeholders are not the same in the different countries, for example the ownership structure for large multifamily houses differs. Even though there are many differences between the countries there are some common gaps and barriers that have been found.

An important finding among all the countries was that there were no technical barriers overcome. The technical solutions to renovate buildings to NZEBR standard do exist and is used in separate projects. However, combining these different technical solutions to one concept is more difficult.

Among all the participating countries three actions to overcome the barriers stood out:

1. Education and information is needed. There is a lack of knowledge among many stakeholders. NZEBR is seen as complicated and uncertain and that is holding the development back. With no one responsible for the holistic view, the solutions that are carried out do not always turn out to be as energy saving as planned. Also, there are too few reference cases and good examples. The Dutch cluster therefore suggests that local networks to share knowledge and good examples should be created. The need for reference projects was pointed out by all the participating countries. Some of the stakeholders also pointed out that the supervision of the compliance to the existing regulations is not always fulfilling and sufficient.
2. Changing working process, calculation methods and tools. The lack of a common definition of NZEBR, calculation methods and models also create barriers. Suggested actions to address this are education and informative efforts as well as new calculation models.
3. Financial grants or longer economic perspectives (LCC). Economic aspects as process play a relevant role when undertaking NZEB renovations. For multifamily buildings in private or mixed (private and social housing) ownership, the financing of investments as well as the decision making are major bottlenecks. The higher the upfront investment the more difficult is the intervention. Energy efficiency improvement measures are related to long term planning and the ownership turnover cycles are often shorter than the payback period for the measures. Post-war houses are expensive to retrofit to NZEBR level since it requires extensive measures and the tenants comes from socio-economical vulnerable part of the society with low ability to pay higher rent. Suggested actions range from financial grants, tax reduction to new business models with long-term pay-back calculations and shared investments among the stakeholders.