



BUILDINGS  
PERFORMANCE  
INSTITUTE  
EUROPE

## A SNAPSHOT OF NATIONAL RENOVATION STRATEGIES— Examples from selected EU Member States

### Briefing

The development and implementation of national renovation strategies by Member States was agreed in the Energy Efficiency Directive<sup>1</sup> (EED) in 2012. Article 4 required national governments to present a first version of such a strategy in April 2014, and that this strategy be updated every three years. In April 2017, all Member States should have submitted a revised strategy to the European Commission. However, on 20 November 2017, only 18 out of 28 strategies seem to have been submitted, as seen on the [website](#) of DG Energy.

This briefing provides a snapshot of measures supporting building renovation in selected Member States as of September 2017. As many national processes are highly dynamic, the situation may change quickly.

To document the efforts made by Member States, BPIE partnered with the Renovate Europe Campaign to examine the strategies provided by selected countries (Croatia, the Czech Republic, France, Greece, Hungary, Ireland, Italy, Poland, Spain). The briefing reviews the steps taken to implement the 2014 version of the renovation strategies and what progress has been made with the 2017 update (for selected countries). The analysis found a range of measures which were newly implemented or developed further to stimulate the renovation of the building

stock. Clearly, some of the reviewed strategies show that it is possible to introduce strategic policies and supporting measures which are benefitting citizens and the economy alike. These countries also prove that progress in renovating the building stock can be achieved if political will and priority setting are allowing it. This document lists some of the major steps taken by national governments as a source of inspiration for others to follow.

The review also analysed a selection of renovation strategies (Croatia, the Czech Republic, France, Italy, Spain), with respect to compliance with Article 4 of the EED. The analysis is based on national versions which are publicly available. The conclusions are derived by comparing the strategies with the guidance provided for the development of National Energy Efficiency Action Plans (NEEAPs) which include a detailed section on the topic.

It should be recalled that this review of the 2017 renovation strategies was undertaken by different organisations in each Member State, albeit based on common criteria, and hence these assessments are subject to the natural variation that exists between different assessors. They reflect a national perspective and should not be used for a country comparison.

<sup>1</sup> DIRECTIVE 2012/27/EU on energy efficiency

## IMPLEMENTATION HIGHLIGHTS

Among the highlights and good practices seen in selected countries are:

### CROATIA

To facilitate the renovation of multi-family buildings, approval now requires a simple majority (51%) of residents, whereas previously such decisions needed to be unanimous. Tackling energy poverty is also now taking on greater importance, with three centres dedicated to the task to be established in 2018.

### FRANCE

The French 2015 Energy Transition Law introduced bold new renovation targets with a clear long-term ambition to achieve the BBC (Bâtiment Basse Consommation<sup>2</sup>) level by 2050 for the entire building stock, with a specific focus on addressing energy poverty. The trigger point “renovation embarquée” has been deployed as well as one-stop-shop advisory services. However, current financial support does not appear to match the ambition.

### HUNGARY

Hungary introduced a new energy advisory network in 2017 to assist local governments to prepare energy efficiency strategies.

### ITALY

Italy has a strong focus on financial incentives for renovation, through the annual finance law which regulates tax deductions for energy improvements in private buildings. This innovative tool could have a strong impact to overcome the financial barriers to renovation.

### CZECH REPUBLIC

All categories of buildings in all regions now have dedicated financial support programmes for both renovation and new efficient construction.

### GREECE

Greece introduced two legislative acts to facilitate and reduce the bureaucracy associated with installing energy saving measures. In another interesting move to address the issue of homes built illegally without license, new laws allow the owner to pay only 50% of the fine, while the remaining 50% can be invested in the energy renovation of the dwelling.

### IRELAND

Ireland has undertaken several actions to overcome some of the barriers identified in the 2014 renovation strategy, including establishing a Behavioural Economics Unit to explore the real motivations and drivers in decision making around renovation.

### SPAIN

Spain had for many years a very successful engagement process with stakeholders, through the GTR<sup>3</sup> and over the last two years, the BUILD UPON<sup>4</sup> Horizon 2020 project.

<sup>2</sup> A BBC residential building has an annual primary energy consumption of less than 80kWh/m<sup>2</sup> (varies according to climatic zone and altitude) <https://www.legifrance.gouv.fr/affichTexte.do?cidTexte=JORFTEXT000021089668>

<sup>3</sup> GTR: Grupo de Trabajo sobre Rehabilitación – “Rehabilitation Working Group”

<sup>4</sup> <http://buildupon.eu/>

## IMPLEMENTATION PROGRESS

This review covers five countries with a published 2017 renovation strategy (Croatia, the Czech Republic, France, Italy and Spain) together with four other countries where progress with strategy implementation has been reported by Renovate Europe National Partners from Greece, Hungary, Ireland and Poland.

### Legislation and other support measures to tackle barriers

Several of the countries within the scope of this review have introduced legislation or other forms of support to tackle barriers or otherwise enhance the market for building renovation. These actions come in addition to those mandated under other Articles of the Energy Efficiency Directive, such as the requirements for Energy Efficiency Obligations (Article 7), Energy Audits (Article 8) and the various aspects of the Energy Performance of Buildings Directive<sup>5</sup> (EPBD).

**FRANCE** enacted the 2015 Energy Transition Law<sup>6</sup> with three overarching objectives for the building sector:

- By 2025, all private residential buildings with primary energy consumption exceeding 330 kWh/m<sup>2</sup> per year must have been subject to energy renovation;
- Renovation of 500,000 homes per year starting in 2017, at least half of which are occupied by low-income households;
- All buildings to be renovated according to the BBC “low consumption building” standard or similar, by 2050.

At the same time, subnational initiatives to increase advisory services for renovation are introducing innovative solutions such as the Picardie Pass Rénovation. However, the renovation targets are not yet supported by the necessary implementing measures.

In order to facilitate the renovation of multi-family buildings, **CROATIA** amended the approval requirements to now a simple majority (51%) of residents, whereas previously such decisions needed to be unanimous. Three centres targeting energy poverty are to be established in 2018, while in the following year, research and local promotional campaigns will be undertaken in all cities with more than 30,000 residents.

**IRELAND** has undertaken several actions to overcome some of the barriers identified in the 2014 renovation strategy, including establishing a Behavioural Economics Unit to explore the real motivations and drivers in decision making around renovation. In another area, the Irish Government proposes to study the

The section examines three aspects of the renovation strategies’ implementation:

- Legislation and other support measures to tackle barriers
- Funding and financial support for renovation
- Engagement with stakeholders

feasibility of establishing mandatory minimum thermal efficiency standards for all rented properties. Meanwhile, the Society of Chartered Surveyors Ireland (SCSI) is due to include a new clause in its Business Leasing Code on green leases in December 2017 which could help tackle the split incentive that exists between landlords and tenants. A new register of qualified contractors has been established, complemented by an Energy Skills training programme, to increase confidence in the workforce.

**SPAIN** has updated its Renovation Law and National Housing Plan, while some regions have also introduced or amended laws. Some of the most interesting developments are taking place at city level, e.g. in Zaragoza, Madrid and Santa Coloma de Gramenet where there is a concerted neighbourhood action to tackle energy poverty.

**GREECE** introduced two acts – “small scale license” and “48h notification license” – to facilitate and reduce the bureaucracy for small interventions/renovations, including energy saving measures such as boiler change, installation or insulation, heat pumps or new windows. With an amendment of Law 4342/2015, introduced in 2017, individual apartment owners in multi-family or multi-purpose buildings have the right to be disconnected from the building’s central heating system by installing new decentralised natural gas boilers, without needing the consensus of the remaining owners. And, in an attempt to tackle the problem of homes built illegally without license, national laws 4178/2013 and 4342/2015 allow the owner to pay only 50% of the fine while the remaining 50% can be invested in the energy renovation of the same house with at least an upgrade of one energy class or a specific percentage of primary energy savings.

**HUNGARY** established a new energy advisory network in 2017 to assist local governments to prepare energy efficiency strategies. Large energy users must now employ energy managers and prepare yearly plans for improving their energy using performance, and the Energy Performance Certificate (EPC) has been amended to include recommendations on energy efficiency measures.

<sup>5</sup> DIRECTIVE 2010/31/EU on the energy performance of buildings

<sup>6</sup> Loi sur la transition énergétique pour la croissance verte

## Funding and financial support for renovation

**CROATIA** - Uptake of renovation measures in residential and public buildings is highly dependent on the availability of grants from national or EU sources. While there are currently no grants for the commercial sector, financial support from the European Structural and Investment Funds (ESIF) for trade and tourism is expected to start soon and grants for public sector buildings (schools and kindergartens) are also expected. Public buildings have been renovated using grants and partially through the ESCO model.

**THE CZECH REPUBLIC** – In terms of financial support, the renovation strategy contributed to the revision of current programmes and to the creation of new ones such that, in the Czech Republic, all categories of buildings in all regions now have dedicated programmes for both renovation and new efficient construction. That said, some programmes are still far from ideal, such as the multi-family housing Regional Operational Programme, where the process of grant administration is still rather complicated for a typical applicant from a condominium, while others are functioning quite well, e.g. the New Green Savings Programme for single-family houses. However, the process of applying for grant support is still considered difficult by some, although improvements have been made. There is an ongoing debate with the banking sector on launching new financial instruments (like green mortgages) with some kind of State support in the form of guarantees.

**FRANCE** – The multiplicity/ complexity of support schemes is seen by observers as an obstacle to their uptake. Innovative financial schemes, such as third-party financing, are slowly emerging, but issues remain as for the treatment of such schemes. This is also not clear whether the finance required to meet the ambitious renovation targets of the Energy Transition Law is in place. However, initiatives at the subnational level such as Energies POSIT'IF are implementing new approaches to financing.

**GREECE** - Financial support for building renovation is available under the following schemes, a number of which were introduced prior to the 2014 strategy but which have been subsequently developed or extended:

- A new financing scheme focusing on the renovation of public buildings was announced, to follow on from its predecessors “Saving” and “Saving II<sup>7</sup>”.
- “Saving at Home<sup>8</sup>” focused on the renovation of private households. It provided grants in the range 15-70%, coupled with preferential interest rate loans. The main part of this programme has ended; however, some remaining budget still serves the remaining applications. “Saving at Home II”

was announced with different criteria and funding schemes as well as easier and faster online application and verification procedures.

- Replacement of old oil boilers with natural gas in private buildings, launched in November 2014. This programme provided grants up to 60% of the total cost and up to €5,500 per household.
- Extension of the district heating network in four Greek cities has been or is expected to be completed, giving the opportunity to a significant number of buildings to replace their old heating boilers.
- Additionally, a new financial support programme for energy efficiency renovation in SMEs was announced.

Despite the ongoing and upcoming programmes, a significant financial gap for energy efficiency interventions remains.

**HUNGARY** - For public buildings, EU grants are available. For households, a new interest-free loan was launched in April 2017, but funds are only sufficient for 25,000-30,000 households. Furthermore, the artificially-low electricity prices for households do not motivate people to save energy or to switch to renewables. The return on investment periods for sustainable energy projects are simply too long for most people.

**IRELAND** – Financial support is in place for residential energy improvements, smart metering, and upgrade of the public building stock, including schools. Grant support for community energy projects has increased by 50%. In the residential sector, two innovative pilot schemes have recently been introduced:

- The Warmth and Wellbeing Pilot Scheme brings comprehensive energy upgrades to homes inhabited by older people and children with certain clinical conditions. A research project has been running in parallel over the three years of the pilot to establish the impacts of these measures on the health of recipients and whether there is a reduction in their need for health services.
- The Deep Retrofit Pilot seeks to explore ways to help homeowners overcome the different barriers to deep retrofit.

In the public sector, a strategy was published in January 2017, including a new pilot deep retrofit scheme, with the option for public bodies to retain financial savings arising from energy efficiency improvements to support other areas of their operational budget.

**ITALY** - Improvements are ongoing in the area of financial incentives for renovation. This is being delivered through the

<sup>7</sup>Εξοικονομώ II

<sup>8</sup>Εξοικονόμηση κατ' Οίκον

annual finance law, regulating tax deductions for energy improvements in private buildings.

**POLAND** – Financial support for the renovation of single-family buildings was in preparation in 2014, but the proposed scheme was eventually shelved. Beginning of 2017, the government promised a new support programme for single-family buildings

## Engagement with stakeholders

Pro-actively engaging stakeholders can set the groundwork for a successful partnership in overcoming renovation challenges.

**THE CZECH REPUBLIC** – The renovation strategy was consulted with stakeholders as part of the National Energy Efficiency Action Plan, with several meetings focused specifically on energy efficiency in buildings, but there is no ongoing engagement concerning implementation of the strategy.

**FRANCE** - Although France has several platforms to discuss renovation issues, consultation on the 2017 long-term renovation strategy was very limited, with no debate about barriers, financing or implementation of the 2014 strategy document.

**GREECE** – The Ministry of Environment and Energy keeps an open dialogue with many stakeholders in the preparation of the different financial instruments such as Saving at Home. However, dedicated meetings or consultations for the implementation of the renovation strategy haven't taken place.

**IRELAND** - Despite consultation being mentioned in the 2014 renovation strategy, engagement with stakeholders to foster implementation has been limited. However, the Department of Communications, Climate Action and the Environment (DCCAE), including the Minister, was highly involved in the BUILD UPON consultation process<sup>9</sup>, supporting 14 workshops across the

in the form of preferential credits along with subsidies for the energy poor, but the scheme has yet to be launched. Should the promised support programme for modernisation of single-family buildings come to fruition, it would be a positive step towards renovating this important sector of the Polish building stock.

country which involved close to 200 key stakeholders. Furthermore, a Climate Change Advisory Council was established under the Climate Action and Low Carbon Development Act 2015 as an independent advisory body tasked with assessing and advising on how Ireland is making the transition to a low-carbon, climate-resilient and environmentally-sustainable economy by 2050.

**ITALY** – There was no consultation during the development of the renovation strategy itself. Instead, there was a public consultation on the final document.

**POLAND** - The Ministry of Energy conducted a public consultation process, but there is no platform for stakeholders arranged by the Government. To fill the vacuum, a private initiative "Efficient Poland" was established, with stakeholders from different fields such as NGOs, expert institutions, and associations representing the different construction trades.

**SPAIN** had for several years a very successful engagement process with stakeholders, through the GTR<sup>10</sup> and over the last 2 years, the BUILD UPON Horizon 2020 project. There is, however, no government platform of stakeholders at national level, though some cities are actively promoting stakeholder engagement, with citizen participation, through "renovation roundtables".

<sup>9</sup>Horizon 2020 project: <http://buildupon.eu/>

<sup>10</sup>GTR: Grupo de Trabajo sobre Rehabilitación – "Rehabilitation Working Group"

# REVIEW OF THE 2017 RENOVATION STRATEGIES

## Compliance

This section analyses to what degree renovation strategies submitted by Croatia, the Czech Republic, France, Italy and Spain are complying with the EED Article 4 requirements. This article defines five headline requirements as shown in the table below.

Of the five 2017 strategies reviewed, those from Croatia and the Czech Republic were found to be fully compliant with Article 4 requirements.

The French, Italian and Spanish strategies adequately cover the

overview of the building stock and existing policies targeting the renovation sector. In the case of Spain and France, cost-effective approaches to renovation were also addressed satisfactorily. However, none of the three strategies provided adequate information on investment requirements or energy savings and wider benefits.

The appraisals are summarised in the table below.

MEMBER STATE	RENOVATION STRATEGY REQUIREMENTS <sup>11</sup>					Does the strategy meet the minimum requirements of Article 4 EED?
	Overview of national building stock	Cost-effective approaches to renovations	Policies and measures to stimulate renovation	Forward-looking perspective to guide investment decisions	Energy savings and wider benefits	
CROATIA						
THE CZECH REPUBLIC						
FRANCE						
ITALY						
SPAIN						

This high-level analysis of a limited selection of 2017 renovation strategies demonstrates a mixed picture in terms of compliance. As in the previous analyses by BPIE<sup>12 13</sup> and the European Commission's Joint Research Centre (JRC)<sup>14</sup> of the original 2014 versions of renovation strategies, the sections which Member States have generally been able to complete satisfactorily are those covering the building stock and existing policies addressing the renovation sector. Cost-effective approaches to renovation

were covered adequately in 4 out of 5 countries. However, three selected Member States (Spain, France, Italy) have been less successful in addressing the sections on forward-looking perspectives, and on energy savings and wider benefits.

The tables in the following pages summarize the evaluated aspects of the respective renovation strategies.

<sup>11</sup>The columns refer to the 5 areas that need to be addressed for a national renovation strategy to meet the Article 4 EED requirements

<sup>12</sup><http://bpie.eu/publication/renovation-strategies-of-selected-eu-countries/>

<sup>13</sup>[https://www.eceee.org/library/conference\\_proceedings/eceee\\_Summer\\_Studies/2015/6-policies-and-programmes-towards-a-zero-energy-building-stock/do-building-renovation-strategies-live-up-to-the-name/](https://www.eceee.org/library/conference_proceedings/eceee_Summer_Studies/2015/6-policies-and-programmes-towards-a-zero-energy-building-stock/do-building-renovation-strategies-live-up-to-the-name/)

<sup>14</sup>[http://publications.jrc.ec.europa.eu/repository/bitstream/JRC97754/syntesis%20report%20building%20renovation%20strategies\\_online%20fin.pdf](http://publications.jrc.ec.europa.eu/repository/bitstream/JRC97754/syntesis%20report%20building%20renovation%20strategies_online%20fin.pdf)

REQUIREMENT	DESCRIPTION	RATING
<b>Overview of the national building stock</b>	Four building archetypes are defined: single-family houses; multi-residential dwellings; public buildings and commercial buildings. Public and commercial buildings are not further divided in sub-groups (such as offices or educational buildings). The building stock has been subdivided according to tenure, location and climate zone (continental and coastal). For each age band, there are well-defined building archetypes reflecting different construction types, energy use and performance characteristics.	
<b>Cost-effective approaches to renovations</b>	Energy efficiency measures are well-described, but renewable measures less so. There is only a very general description of measures and no prioritization.	
<b>Policies and measures to stimulate deep renovation</b>	Barriers have been analysed and some new policies/measures identified to address the barriers.	
<b>Forward-looking perspective to guide investment decisions</b>	Investment requirements have been quantified and possible funding sources listed, but the forward-looking perspective lacks clarity on how to best make use of limited resources.	
<b>Energy savings and wider benefits</b>	Energy savings have been quantified and wider benefits identified.	

**OVERALL ASSESSMENT:** a compliant strategy<sup>15</sup> This assessment has been carried out by the Croatian Renovate Europe partner, HUPFAS (the Croatian Association of Heat-Façade Systems Manufacturers)

## THE CZECH REPUBLIC<sup>16</sup>

Based on an evaluation by **CHANCE  
FOR BUILDINGS**

(Czech version) [https://ec.europa.eu/energy/sites/ener/files/documents/cz\\_building\\_renov\\_2017\\_annex\\_4\\_of\\_neeap\\_cs.pdf](https://ec.europa.eu/energy/sites/ener/files/documents/cz_building_renov_2017_annex_4_of_neeap_cs.pdf)

(English version) <https://ec.europa.eu/energy/sites/ener/files/ener-2017-00343-00-00-en-tra-00.pdf>

REQUIREMENT	DESCRIPTION	RATING
<b>Overview of the national building stock</b>	The overview is based on two detailed analyses focused on residential and non-residential buildings, with data from the Czech Statistical Office. Where available, a further breakdown by use, size, construction type and age is provided.	
<b>Cost-effective approaches to renovations</b>	Renovation measures are divided into two main categories: building envelope and technologies, including renewables (particularly for the more comprehensive, deeper renovations). Both are then elaborated in more detail based on depth of renovation. The model used for calculation of savings assesses the cost effectiveness of minor, moderate and deep renovations and these feed into the related scenarios.	
<b>Policies and measures to stimulate deep renovation</b>	Existing policies and measures are described in some detail in the Czech National Energy Efficiency Action Plan, but not in the renovation strategy itself. Barriers are described in general, but not elaborated or linked to the policy framework. The strategy includes some 20 recommendations in the areas of finance, legislation, administration, education and general (energy) policy.  Macro-economic modelling shows that, from a long-term perspective, deep renovation clearly pays off and brings much more benefits than minor ones. Accordingly, one of the policy recommendations is the focus on deep (or staged-deep) renovation support. The conditions of various support schemes in the Czech Republic already encourage this by offering higher support levels for deeper renovation. The recommendation aims to continue this practice.	
<b>Forward-looking perspective to guide investment decisions</b>	Total annual and cumulative investment needs to 2020, 2030, and 2050 are calculated for each of the five scenarios, including splits by sector: single-family houses, multi-family houses and public buildings. Modelling also reflects two potential future climate scenarios. The model used for scenario analysis is based on a representative sample of 1000 model residential buildings, and 100 actual non-residential buildings. These building archetypes are subjected to minor, moderate or deep renovation depending on the scenario and then scaled to the whole building stock.  Existing sources of finance are identified and described, but funding for future investment needs is unclear. To a significant degree, this is because the majority of current funding for building renovation support schemes in the Czech Republic comes from the 2014-2020 programming period of European Structural and Investment Funds. Unfortunately, these funds will most probably no longer be available at the current scale for the Czech Republic in the next EU Multiannual Financial Framework programming period.  Some new financial instruments are proposed, such as green mortgages/loans and new taxation, but they are not sufficiently elaborated.	
<b>Energy savings and wider benefits</b>	The potential energy savings are presented based on the renovation scenario, depth of renovation and future climate. Wider benefits are mentioned, focused mainly on macro-economic societal benefits, including GDP and employment impacts. Also, the benefits from improved indoor environment are estimated in terms of saved finances on public health spending and reduced work productivity loss.	

**OVERALL ASSESSMENT:** a compliant strategy with a good overview of the building stock and the section on energy savings and wider benefits

<sup>16</sup> This assessment has been carried out by the Czech Renovate Europe partner, Chance for Buildings

REQUIREMENT	DESCRIPTION	RATING
<b>Overview of the national building stock</b>	There is a reasonably detailed breakdown of the building stock, but without separate quantification of public buildings, no rural/urban split and no split per climatic zone.	
<b>Cost-effective approaches to renovations</b>	Several examples of renovation of typical building types are presented, with cost calculations.	
<b>Policies and measures to stimulate deep renovation</b>	The strategy sets out a 10-point policy plan, based on the 2015 Energy Transition Law.	
<b>Forward-looking perspective to guide investment decisions</b>	A key flaw of the French strategy is the lack of a macro-economic approach - there are no figures for total investment requirements.	
<b>Energy savings and wider benefits</b>	Overall energy savings profile for the low-carbon scenario are presented, but there is no discussion or quantification of the wider benefits.	

**OVERALL ASSESSMENT:** the absence of a forward-looking perspective to guide investment decisions, and an inadequate exposition of the energy savings and wider benefits, lets down what is otherwise a reasonable strategy

<sup>17</sup> This assessment has been carried out by the French Renovate Europe partner, Coalition France pour l'Efficacité Énergétique

REQUIREMENT	DESCRIPTION	RATING
<b>Overview of the national building stock</b>	The overview covers residential buildings (single-family houses; multi-residential dwellings) and some non-residential buildings (schools, offices, hotels, banks, commercial buildings). Only residential buildings are broken down by age band and by climatic zone.	
<b>Cost-effective approaches to renovations</b>	Cost effectiveness of renovation was evaluated, but without describing the technical packages applied and the relevant building specifications.	
<b>Policies and measures to stimulate deep renovation</b>	Existing policies and measures, as well as most of the common barriers, are described well. In terms of new policies/measures, there are some suggestions for new financing tools, but beyond that, no real change to the policy landscape is envisaged.	
<b>Forward-looking perspective to guide investment decisions</b>	Investment requirements are quantified, but only to 2020. Existing sources of funding are identified, but no attempt made to address the funding gap with new finance or funding schemes.	
<b>Energy savings and wider benefits</b>	Improvements in energy performance are presented in terms of kWh/m <sup>2</sup> , but no attempt made to quantify total savings or wider benefits.	

**OVERALL ASSESSMENT:** only 2 out of the 5 requirements of the EED Article 4 are covered adequately

<sup>18</sup> This assessment has been carried out by the Italian Renovate Europe partner, Renovate Italy

REQUIREMENT	DESCRIPTION	RATING
<b>Overview of the national building stock</b>	The 2014 strategy provided a good overview of the building stock, but this has not been updated in the current strategy. However, an update of the strategy is planned once the latest census and energy consumption data have been acquired.	
<b>Cost-effective approaches to renovations</b>	Cost effectiveness was covered in detail in the 2014 strategy; as above, this section will be reviewed once new data becomes available.	
<b>Policies and measures to stimulate deep renovation</b>	There is a comprehensive and detailed description of existing measures and policies, as well as a reasonable analysis and understanding of barriers. That said, the proposed measures in the 2014 strategy have not become policies.	
<b>Forward-looking perspective to guide investment decisions</b>	At present, the analysis is rather weak, but investment requirements are due to be updated once new data becomes available. Existing funding sources are enumerated, but no new funding streams or financing options have been proposed.	
<b>Energy savings and wider benefits</b>	Savings were already quantified in 2014. Other wider benefits, which are the subject of growing interest, were identified but not quantified. It is noteworthy that energy poverty is addressed in the 2017 strategy, whereas it was not discussed in the 2014 version.	

**OVERALL ASSESSMENT:** some of the strong points of the 2014 Spanish renovation strategy are not carried through into this 2017 version

<sup>19</sup> This assessment has been carried out by the Spanish Renovate Europe partner, Renovate España

## CONCLUSION

This review of the renovation strategy implementation over the last three years in a selection of nine Member States reveals several interesting and innovative initiatives which are helping to develop the market for building renovation across Europe. Some countries acknowledge the importance of the building sector in achieving climate mitigation, and the need to tackle energy poverty is climbing up the agenda. However, there is insufficient information provided by the governments on the impact of their renovation strategies, or the evolution of the market for building renovation.

A fundamental difficulty cited several times is the limited influence that the ministry responsible for preparing and implementing the strategy has on other ministries, let alone the wider network of organisations with a role to play in improving the conditions for building renovation.

Despite three years of experience with renovation strategies, the major shortcoming revealed by this review is the absence, in most cases, of a truly strategic approach to both the design and implementation of the renovation strategies, to engage, over time, the various stakeholders within government, local and regional authorities, agencies, industry and the wider public. An ongoing engagement strategy is key to successfully involve all relevant stakeholders and to lay down the groundwork for a collaboration based on trust. However, for unclear reasons, many governments seem to keep ignoring the pivotal role that networks of stakeholders can play to overcome the barriers to renovation. This is one of the most important areas to improve in the future development and implementation of renovation strategies.

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- France – Coalition France pour l'Efficacité Energétique
- Greece – INZEB (Institute of Zero Energy Buildings)
- Hungary – Hungarian Energy Efficiency Institute
- Ireland – Irish Green Building Council
- Italy - Renovate Italy
- Poland – Efficient Poland
- Spain – Renovate España



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