

Annual Report 2025

FROM INSIGHT TO IMPACT

Buildings Performance Institute Europe

bpie.eu



BPIE's vision is a climate-neutral built environment, aligned with the ambition of the Paris Agreement, and in support of a fair and sustainable society.

We provide data-driven and actionable policy analysis, advice, and implementation support to decision-makers in Europe and globally.

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FOREWORD



Agneta Persson

Chair of the Board of Directors

We are living in uncertain times. Ongoing wars and conflicts are causing indescribable humanitarian suffering, and highlighting our society's dependence on fossil fuels. The energy supply of Europe, and many other countries, is under huge stress. Reducing energy demand is a key solution that alleviates energy poverty, secures energy supply and reduces greenhouse gas emissions.

In this environment, BPIE has succeeded in maintaining and expanding its work, delivering thought leadership and advocacy on building and energy demand policies. Their cutting-edge research on technologies and economy of the building sector is unparalleled. As the chairperson of BPIE, I am proud to see how the team, led by Oliver Rapf, continues to support the implementation of the EPBD and other energy-efficiency policies.

On the global scene, BPIE plays an increasingly important role, building valuable bridges with senior policy makers in other countries. In this way, the regulatory and technical achievements of European buildings policy become more familiar around the world. This is essential if we want to reduce fossil fuel consumption rather than shifting it from one continent to another. Decarbonising our energy systems can and should be done while tackling energy poverty, improving air quality and contributing to our climate goals.

Addressing a combination of key sustainable development goals is a trademark of BPIE's. Its research and advice supports more ambitious EU climate targets, mitigation of economic crises and the resilience of the buildings sector in the face of destruction caused by conflict. BPIE shows how important it is to address short- and long-term issues together.

The years ahead will be difficult. We live in a new age of political and economic unpredictability. With its professionalism and commitment, the BPIE team is well prepared to address the need for energy efficiency and be a strong, reliable partner for governments and industries in Europe and globally.



Oliver Rapf

Executive Director

This overview of BPIE's year in 2025 serves as a stark reminder of how complex and challenging a task it is to change our built environment for the better. By "better" we at BPIE mean homes that are healthier, more affordable and sustainable. We also imagine offices, schools and hospitals that are conscientiously designed with their users in mind, including with great daylight and air quality. More simply: better buildings are those which serve the needs of citizens because they are future-proof and resilient.

The anchor to achieve this goal is policy. This is where a cutting-edge think tank like BPIE is making a difference. We ask which policies have the biggest impact and feed the answers into political decision-making. We show how industry, investors and citizens can contribute their bit to the necessary change.

We convene well-informed exchanges which, while potentially controversial, we believe should never be polarising. We invite stakeholders and experts to review our work and to challenge our findings, because we believe in expanding our horizons.

I am proud of what the BPIE team is achieving, often together with partners, in times which are throwing new challenges our way on an almost daily basis. I am thankful for the dedication of my colleagues, and for your interest in our impact. This report contains many examples, and I hope you enjoy reading it.

IN NUMBERS

BPIE IN 2025

21

publications

60

speaking contributions

OUR WEBSITE

147k

page views

78k

users

22k

downloads

WHERE ARE USERS FROM?

Germany	11,598
Belgium	9,539
China	9,315
United States of America	8,988
France	4,490
United Kingdom	3,285
Italy	3,198

LINKEDIN STATS

178,661

impressions

9,182

total followers

+1,500

new followers

FINANCIAL STATS

EU grants	32%	€ 970 k
Foundations & multilateral funders	45%	€ 1,353 k
Service contracts & speaking fees	20%	€ 602 k
Sponsorships	3%	€ 88 k

Turnover 2025

+ € 3 million

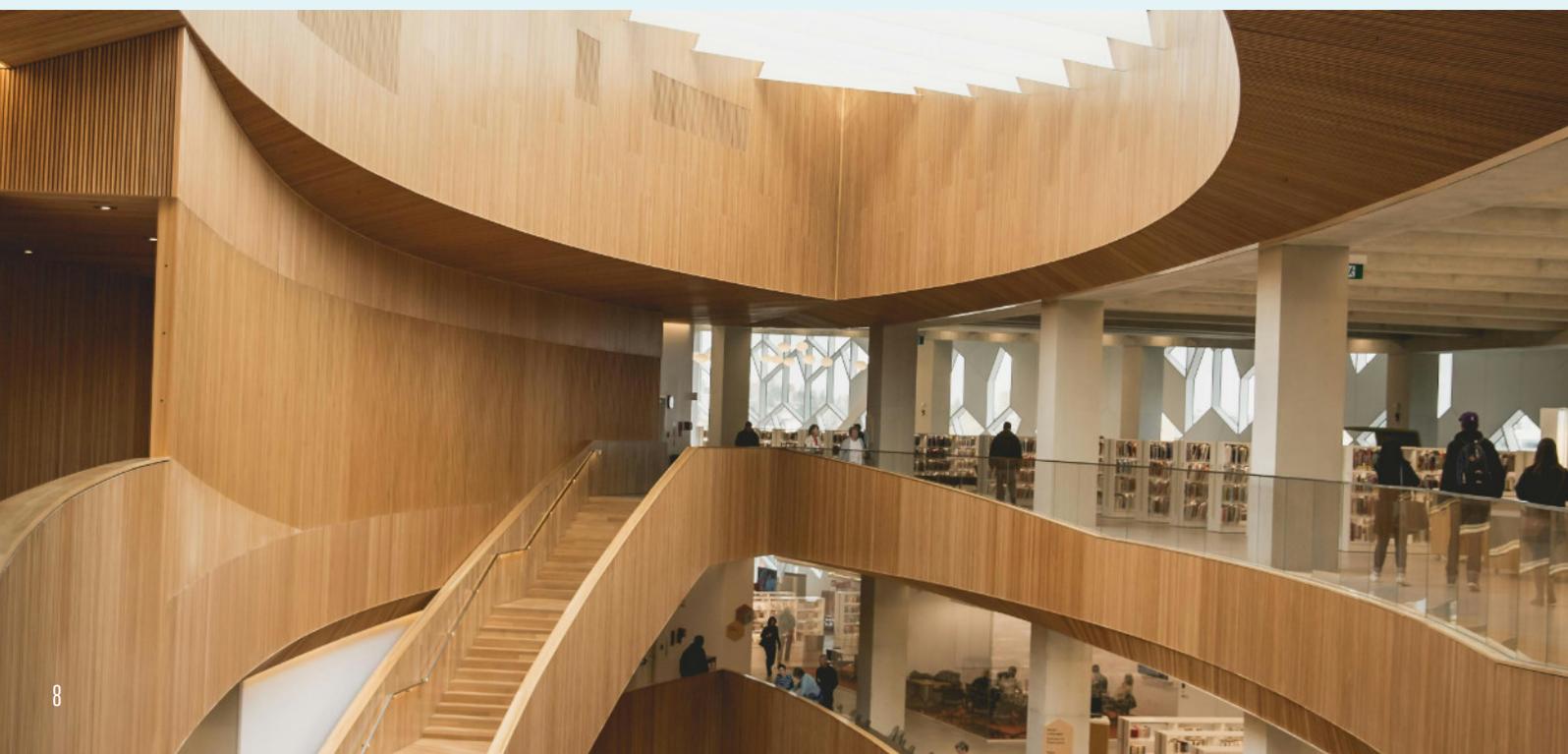


INTRODUCTION

BPIE has been informing political thinking and driving action to reduce the climate impact of the built environment since 2010. Our work is focused on a socially fair transition, and underpinned by evidence-based arguments that support innovative policy and initiatives.

We shape the narrative on a desirable future for the buildings and construction sector in the EU and globally. We're committed to harnessing the huge potential of buildings to deliver an affordable carbon-neutral built environment that's integrated with a decarbonised and flexible energy system.

Our work and team are embedded in European values of fairness, sustainability and innovation.





SHAPING THE POLICY AGENDA

At BPIE, we take our role as a leading think-tank seriously. We look beyond the horizon, defining topics that contribute to decarbonising the built environment, rather than just echoing them. Our goal is to ensure that housing becomes both more affordable and healthier.

In 2025 we focused on how to cut emissions, while making better use of Europe's existing buildings. This included identifying key factors that can accelerate or obstruct positive change.

During the year, our Executive Director was invited to join the Advisory Board for the European Affordable Housing Plan. Published in December, the Plan supports the repurposing of underused space, highlighting the need to comprehensively analyse the affordability of housing. We spoke at numerous events in the run-up to its publication, including hearings in the European Parliament, the High-Level Conference of the Danish EU Presidency, and discussions hosted by partners.

As part of an analysis for the EU's Directorate-General for the Environment, in partnership with experts from Ramboll and KU Leuven, we explored the potential of sufficiency measures to optimise existing building stock as an alternative to new construction. Our report supported the EU Roadmap for the Reduction of Whole Life Carbon Emissions. It showcased the benefits of sufficiency measures, with insights from real-world initiatives from five EU Member States.

In a second report, we looked at how vacant and underused office buildings across Europe can be transformed into affordable, low-carbon homes. This showed that office-to-housing conversions offer a practical solution for creating residential units, while often being faster and featuring a lower environmental impact than new construction. Our report also fed into the European Affordable Housing Plan and informed the work of the Carbon Neutral Cities Alliance and the EU Circular Economy Stakeholder Platform.



Healthy Buildings for a Climate-Resilient Future is a topic we've been working on since 2023. During the 2025 London Climate Week, we hosted a high-level workshop with Velux at the Danish Embassy. This explored how the UK and EU can work together to create buildings that are not only climate-resilient, but healthier, safer, and more affordable for all.

Accelerating innovation in the construction sector is essential to deliver climate-resilient, healthy and affordable buildings across Europe. In 2025 we completed a project which defined five innovation areas, including renovation process innovation, which emerged as a key enabler for scaling up renovation activities. We shared our findings during a webinar in July on "[Upscaling innovation in renovation](#)". We also organised an "Apéro" event in Berlin for decision-makers, industry, and research representatives, gathering positive feedback for a new event format.

In Germany, we prepared the ground for new life-cycle greenhouse gas regulation in partnership with the German Sustainable Building Council (DGNB). This led to a series of papers and webinars about the "[Relevance and Costs of a Life-Cycle Perspective](#)". We co-organised a Policy Lab with our partners Bauhaus Erde and ProjectTogether in April. True to our approach, this looked beyond national boundaries and featured insights from other EU countries. We also contributed to the follow-up report published by Bauhaus Erde and the Bauwende-Allianz. Over the following months, we shared our insights with over 450 stakeholders, a clear sign that the lifecycle perspective for building sector emissions is gaining increasing attention.

In an experimental project with Velux, No Objectives and Artelia, we asked the provocative question "Is the future already built?". This explored how planetary boundaries could and should be applied to the built environment. It also considered how to integrate human wellbeing and the restoration of ecosystems into construction activities. 50 leading experts discussed our results at the Velux LKR Innovation House in Østbirk, Denmark.

As part of an analysis for DG GROW, we took a close look at the carbon emissions associated with buildings. This included a review of carbon removal options at EU and national levels, along with an assessment of carbon emission hotspots that fed into the 2026 EU Whole Life Carbon Roadmap.



Image: Cancillería Ecuador / Flickr (CC BY 2.0)

Positive Energy Neighbourhoods (PENs) combine energy efficiency, renewable generation, and social inclusion to deliver long-term environmental and societal co-benefits. In the [oPEN Lab](#) project, we explored how private finance for PENs can be leveraged and public funds deployed most effectively.

There can be many reasons to renovate a building, including improving seismic safety, a priority in European regions where earthquakes are frequent. The [e-SAFE](#) project concluded in 2025 with a final conference in Brussels organised by BPIE. During its five-year lifespan, we contributed policy briefs with practical recommendations on how to integrate seismic and energy renovations. Our work also supported community participation, and explored financing mechanisms that can enable integrated renovations. As always, our goals were to make buildings safer, more energy-efficient, and more affordable.

Finally, the BlueBird project explored the decarbonisation of buildings from an energy systems perspective by addressing demand-side flexibility. In 2025, we highlighted policy levers that can integrate buildings into flexibility markets more effectively, creating a cross-country assessment of regulatory drivers and barriers.

SUPPORTING EPBD IMPLEMENTATION

The [Energy Performance of Buildings Directive \(EPBD\)](#) came into force in May 2024, and we've been expanding our support for national policy making in the EU and beyond since then.

Our EPBD implementation guide provided a comprehensive "How to" manual for national policymakers responsible for rolling out the Directive. It explains the EPBD's core articles in accessible language, accompanied by examples of good practice. In a separate report we provided insights into effective ways of renovating residential buildings, reflecting a new provision in the Directive. As well as these two reports, we continue to deliver a range of projects to support decision-making in Member States.

Renovation policies and optimised decarbonisation strategies need reliable data. In Germany, we set out proposals for a buildings efficiency database, running a series of events with stakeholders from policy and industry.

Meanwhile, in Hungary, Poland and Romania the [JustReno](#) project has been ensuring a socially just transition by prioritising the worst-performing buildings and vulnerable households for building renovation. We produced reports for each country, along with policy packages to address the two target groups and ensure the transition is fair and inclusive.

[ComActivate](#) tackles the growing levels of energy poverty across the EU, with pilot projects in four municipalities in Bulgaria, Hungary and Lithuania.

Our [analysis of EU and national level policies](#) related to large-scale apartment renovations and alleviating energy poverty mapped policies for renovations and tackling energy poverty, with insights about their implementation and recommendations to adjust policy frameworks.



BPIE co-hosted a roundtable in the European Parliament as part of the ComActivate project.

EPBD.wise is fostering dialogue between ministries, industry, and experts on turning the EPBD into effective national action and providing guidance on national legislation for specific provisions of the EPBD. In 2025 we supported online roundtables and policy forums in Hungary, Bulgaria, Romania, Poland, Ukraine and Greece as part of EPBD.wise.

Our partnership with the World Bank's Energy Efficiency in Buildings Community of Practice provides capacity-building resources for government officials in Europe and Central Asia. It includes selected EU countries, the Balkan region, Turkey, Georgia, Armenia, Uzbekistan and many others. We're co-organising a series of webinars providing input on trends and good practices. Topics covered include implementing EU legislation, ESCO financing, and strengthening the construction supply chain.

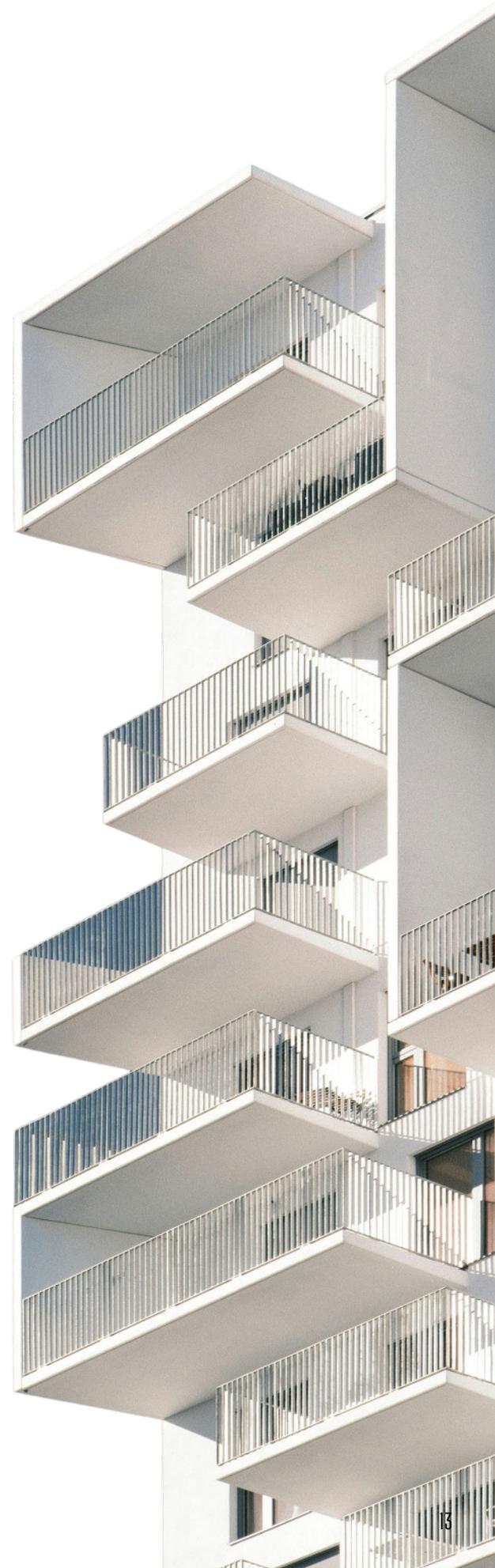
The Renocally project supported municipalities in Slovakia, Romania and Bulgaria to develop strategies for renovating their building stock using tools like Building Renovation Passports. It also delivered training on accessing financing.

In Italy, we monitored progress on decarbonising building stock with our Buildings Climate Tracker. This spurred intense discussions among stakeholders and in the Italian media.

Our technical work also laid the foundation for effective policymaking. This included contributing to the EU's cost-optimality framework, which defines what counts as a "good" renovation. We contributed to the public consultation on the methodology, ensuring that health and environmental factors are reflected in cost-optimal calculations, and arguing for appropriate parameters to define what is cost-optimal.

We also developed recommendations for a harmonised framework for whole life carbon (WLC) measurement to help shape further EU regulation. And as part of INDICATE, we're working to advance WLC policy by improving life cycle assessment data and methodologies across eight member states.

Data should be at the core of decision-making, and we're proud that our consortium ran the European Building Stock Observatory for a third year. The Observatory is an online database that collects and shares data and indicators about our buildings. It's the go-to place for anyone interested in deep insights on the evolution of energy-related indicators.





2025 Changemakers and Policy Dialogue at the European Parliament.

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OUR CONVENING POWER

BPIE frequently convenes decision-makers and experts for deep exchanges on both emerging topics and detailed questions. Our meeting formats range from conferences to intimate workshops. As well as online meetings, we value the richness of in-person exchanges and organised many gatherings in 2025.

A highlight was the [BPIE Changemakers and Policy Dialogue 2025](#) at the European Parliament in February, hosted by MEP Thomas Pellerin-Carlin, with contributions from MEP Benedetta Scuderi and DG Energy's Alejandro Ulzurrun de Asanza. We heard from changemakers across Europe who have turned challenges into opportunities, transforming their communities through renovation. These included Manuela Navarro, a retired secretary in a Madrid building complex, who started a renovation movement which led to the renovation of 80 buildings and 1,800 flats, cutting heating bills by up to 92%.

In November we organised a roundtable in the European Parliament with our partner Habitat for Humanity International, hosted by MEP Marcos Ros Sempere. The theme was energy poverty and affordable housing. Representatives from the Parliament and Commission were joined by experts from Lithuania, Hungary and Bulgaria to explore how real-world experiences of tackling energy poverty can inform stronger EU action.

Over the course of the year, we organised several workshops addressing specific policy fields to decarbonise buildings. We held design sprints in four countries to prepare governments implementing national Whole Life Carbon regulations. These were supported by briefing sessions for public officials, plus national kick-off events to foster early engagement of stakeholders.

We also collaborated with construction materials associations such as EURIMA to build capacity and support within the industry. During a co-creation workshop with policymakers and industry, we discussed principles for a harmonised methodology for Whole Life Carbon accounting.

In Berlin, we convened a two-day policy lab on Whole Life Carbon Policy with over 40 participants. Germany is not only technically ready to implement a WLC regulation, but also has stakeholder support. Our lab initiated a ministerial exchange between German and Danish representatives of the building and construction authorities.

Digital Building Logbooks can be a driver of affordable, circular and sustainable housing. They are an emerging concept which we're developing in an EU-funded project with partners from many countries. As part of [Demo-BLog](#) we organised a policy event attended by representatives from industry, the European Commission, research institutions and public authorities. The Commission recently published the draft standardisation request on digital building logbooks, accelerating the deployment of this innovative tool.

We organised conferences in Brussels to present final results of two EU-wide projects alongside other members of the consortia. The [Syn.ikia](#) conference in March showcased how Sustainable Plus Energy Neighbourhoods can become the norm across Europe. It featured four pilot projects demonstrating innovative solutions for energy efficiency, flexibility, and local renewables. In September, the final [e-SAFE](#) conference presented strategies and pilots for integrating combined approaches for energy and seismic renovation.



BPIE organised, moderated and delivered the opening address at the 2025 Changemakers and Policy Dialogue.



Experts and policymakers gathered at the e-SAFE final conference, organised and chaired by BPIE

BEYOND THE EU

BPIE's influence extends well beyond the borders of the European Union. Guided by our mission to shape the global narrative, we contribute to international research, convene cross-border exchanges, and support countries navigating the transition to a decarbonised built environment. In 2025, this work took on greater urgency as the gap between ambition and action in the global buildings sector continued to widen.

As a co-author of the [Global Status Report for Buildings and Construction 2024–2025](#), BPIE helped chart progress towards climate goals in the buildings sector. The report acknowledges steps forward, but issues a call for urgent action across six key challenge areas.

BPIE's contributions also shaped specific thematic content: our research on extended producer responsibility was included, and the fifth edition of the global buildings climate tracker was also presented as part of this edition.



BPIE's participation in the Global ABC annual assembly provided a further platform to identify concrete next steps, and preliminary results from the 2025–26 edition were shared at COP30, keeping buildings firmly on the international climate agenda.

In a landmark collaboration with UCL, Arup, and RISE, BPIE contributed to the development of a Global Whole Life Carbon tracker combining top-down and bottom-up methodologies to make estimates of embodied emissions from new construction more accurate. This spans 14 regions and extends beyond the conventional focus on cement, steel, and aluminium to encompass glass, bricks and ceramics, and other metals. The findings are sobering: embodied emissions from the global building stock appear to be higher than previously understood, and the results will feed directly into the Global Status Report 2025–26.

Tracking progress credibly is as important as setting targets. The momentum following COP28's historic pledge to double energy efficiency is real, but the main way we measure building efficiency — energy consumed per square metre — is skewed by variables such as weather patterns, occupant behaviour, and economic activity. Our analysis suggests actual efficiency gains may be running at only around 0.4% per year — a fraction of the 4% annual improvement needed to meet global targets. In response, BPIE published an independent [discussion paper](#), Making the Global Pledge to Double Energy Efficiency Count, proposing a suite of complementary indicators. The paper calls on the IEA, the European Commission, and international leaders to ensure progress can be tracked with accuracy and accountability.

The reconstruction of Ukraine presents one of the most consequential opportunities of our time — not just to rebuild what has been destroyed, but to build back better. We explored how embedding the Energy Efficiency First principle in reconstruction planning can unlock multiple benefits, including lower energy costs, improved resilience and EU regulatory alignment. Our [report](#) set out a planning framework to turn the urgency of reconstruction into a foundation for a more sustainable future for Ukraine and its people.





OUR DONORS

In 2025, BPIE received funding from the following organisations:

Bauhaus der Erde gGmbH

Breakthrough Energy Foundation

Cool Heating Coalition

DESNZ UK

Deutsche Gesellschaft für Nachhaltiges Bauen DGNB

Etex NV

EURIMA

European Climate Foundation

European Commission

Federal Ministry for the Environment, Climate Action, Nature Conservation and Nuclear Safety, Germany

ADEME (French Agency for Ecological Transition)

Green European Foundation

IBRD - The World Bank

ICF SA

Kingspan Holdings PLC

Laudes Foundation

Rockwool International A/S

Schwäbisch Hall Foundation

UNEP

Velux A/S

ZEBAU GmbH

ZIA Zentraler Immobilien Ausschuss e.V.

Zukunft KlimaSozial ZKS gGmbH



Buildings Performance Institute Europe

**BPIE IS A LEADING INDEPENDENT
CENTRE OF EXPERTISE ON BUILDINGS.**

**WE ARE ADVANCING THE TRANSITION
TOWARDS CLIMATE-NEUTRALITY IN
EUROPE AND GLOBALLY.**

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