Qual DeEPC

HIGH-QUALITY ENERGY PERFORMANCE
ASSESSMENT AND CERTIFICATION IN EUROPE
ACCELERATING DEEP ENERGY RENOVATION





Roundtable on draft EU policy recommendations, 3rd February 2022

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INTRODUCTION TO QualDeEPC





QualDeEPC Project

- High-quality Energy Performance Assessment and Certification in Europe Accelerating Deep Energy Renovation
- Horizon2020 project
- Project duration from September 2019 August 2022
- Project coordination by Wuppertal Institut, Germany
- Project partners from **Belgium, Bulgaria, Germany, Greece, Hungary, Latvia, Sweden and Spain**





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QualDeEPC Partners









escan













ARENE













OBJECTIVES and METHODOLOGY of QualDeEPC





Objectives

Enhance EPC assessment, certification, and verification, regarding

- (1) the quality and cross-EU convergence of Energy Performance Certificate (EPC) schemes, including building assessment and EPC issuance, design, verification, and use;
- (2) the link between EPCs and deep renovation.





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Approach

Analysis

Analysis of existing EPC schemes, good practice, shortcomings, and priorities for improvement (WP 2)

Development

Development of concrete proposals and tools for enhanced EPC assessment, certification and verification, as well as Deep Renovation Network Platforms (WP 3)

Testing

Testing of enhanced EPC scheme (WP 4)

Roadmap

Adaptation to country needs and **implementation** of consensus elements, as well as developing a roadmap for further **dialogue** (WP 5)

Strategy

Development of a **sustainability strategy** and conclusive **policy recommendations** for regional, national, and transnational dialogue, and transfer (WP 7)



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QualDeEPC- 7 development priorities

White paper holds concepts developed for the seven priorities that QualDeEPC identified in its first phase:

- A. Improving the **recommendations** for renovation, provided on the EPCs, towards deep energy renovation
- B. Online tool for comparing EPC recommendations to deep energy renovation recommendations
- C. Creating Deep Renovation Network Platforms
- D. Regular mandatory EPC assessor training (on assessment and renovation recommendations) required for certification/accreditation and registry
- E. High user-friendliness of the EPC
- F. Voluntary/mandatory advertising guidelines for EPCs
- G. Improving compliance with the mandatory use of EPCs in real estate advertisements



QualDeEPC's development priorities and EPBD-related policy recommendations

https://qualdeepc.eu/white-paper-on-good-practice-in-epc-assessment-certification-and-use





E) High user-friendliness of the EPC

• Make it more useful as first step to deep renovation and for buying/rental market **Policy proposal:** draft enhanced general template for EPC form with these elements:

| | | Implementation | Recommended | Not |
|-----|---|----------------|----------------|--------------|
| | | in enhanced | for enhanced | recommended |
| No. | Element | EPC form temp. | EPC form temp. | on EPC temp. |
| 1 | Inclusion of past metered or modelled total energy consumption per yr | X | | |
| 2 | Details on building envelope and building HVAC system | X | | |
| 3 | Display of improved classifications and energy performance | X | | |
| 4 | No. 3 + energy savings in kWh/year | X | | |
| 5 | Detailed renovation recommendations by component + cost estimation | X | (X) | |
| 6 | Useful combination of renovations & stepwise implementation | X | | |
| 7 | General information about EPC | | X* | |
| 8 | Link to Deep Renovation Network Platform | X | (X) | |
| 9 | Glossary of most important terms | | X* | |
| 10 | Link/ information on funding programs | | (X*) | X |

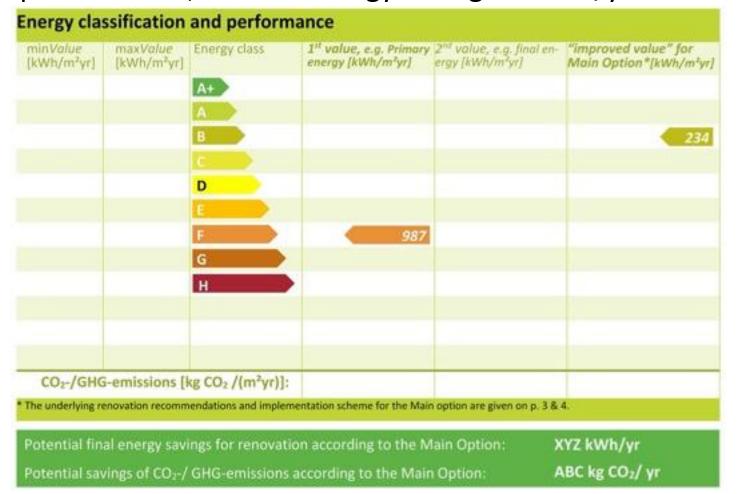
^{*} May be included in Deep Renovation Network Platform

⁽⁾ A simplified version can be implemented.



E) High user-friendliness of the EPC

Example: section for elements 3 - Display of improved classifications and energy performance, and 4 – energy savings in kWh/yr



"Main option":
a recommended combination
of energy efficiency and
renewable energy actions
among the renovation
recommendations

Objective of elements 3 and 4: easy visibility of potential improvements in energy class and potential energy savings and GHG reductions



E) High user-friendliness of the EPC

Policy recommendation for EPBD:

- In Art. 16: Require additional content in the EPC, e.g. from the list included in draft offered by QualDeEPC, and a length of the main document of 3 to 5 pages, as well as that the renovation recommendations be consistent with deep energy renovation in their selection and energy efficiency levels, and that possibilities for a stepwise implementation are indicated.
- Particularly, add to Annex V the following mandatory indicators:
 - Display of improved classifications and energy performance after implementing a recommended combination of renovation actions ('main option') on p. 1
 - Potential energy savings (in kWh/yr) after implementing the 'main option' on p.1
 - Details on building envelope and building HVAC system, using a traffic light system
 - Detailed renovation recommendations by component, consistent with deep energy renovation (QualdeEPC priority A), using the traffic light system too
 - Useful combination of renovations and stepwise implementation as a first step towards a Building Renovation Passport
 - Link to a Deep Renovation Network Platform (QualdeEPC priority C)



A) Recommendations for renovation on the EPCs geared towards deep energy renovation

- Make recommendations compatible with deep renovation
- Maybe the first step to a building deep renovation roadmap
- Guiding principle: component efficiency levels derived from nZEB standards (considered cost-optimal)
- Policy Proposal: 15 areas of recommendations, examples:

| | Spacific recommendation | Example for Germany (draft values) |
|--|--|------------------------------------|
| External wall insulation | Wall with enhanced thermal insulation properties (nZEB for renovation standard or similar) | U=0.2 W/(m ² K) |
| | Wall with exceptional thermal insulation properties (nZEB for new buildings standard or similar) | U=0.15 W/(m ² K) |
| Replacement/ modernization of the heating system | Heating systems with EU energy label Cat. A or above, for example: | |
| | | |



A) Recommendations for renovation on the EPCs geared towards deep energy renovation

Policy recommendation for EPBD:

- In Article 16 (4) or a new paragraph in Art. 16:

 Require Member States to adapt the definition for 'deep renovation' and specify the renovation recommendations that must be provided on EPCs in the following way:
 - Specify the energy efficiency levels to be recommended for different types of actions, so that these are
 consistent with deep renovation leading to nZEB standards for existing buildings, even when implemented
 step by step according to a Renovation Passport, e.g. using the proposal for enhanced renovation
 recommendations (priority A) and traffic light system (priority E) provided by QualDeEPC
 - Clarify that in the EPC itself, the EPC assessor should include all potential recommendations needed to
 achieve nZEB standards for existing buildings (i.e., deep renovation according to the proposal for the EPBD
 recast), but clarify whether they are cost-effective only with financial incentives existing at the time of
 issuance of the EPC, or in connection to renovation works that are scheduled anyway (i.e., based on energyrelated costs only, as it is already specified in the EPBD).
 - **Develop a set of methods and data to include co-benefits** of building renovation into the cost-effectiveness calculation **and require their use.**
- In Art. 22 on independent experts: Possibly also require Member States to include all of the former into the mandatory training or examination (QualDeEPC priority D).

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EPCs geared towards deep energy renovation: Additional policy recommendation 1)

- Draft recast of EPBD defines 'deep renovation' to achieve nZEB before 2030 and zero-emission building from 2030: good!
- Also, defines 'staged deep renovation' in relation to renovation passport:
- What about buildings that do not have a renovation passport (from 2025, voluntary)?

Policy recommendation for EPBD:

- A second part written in italics could be added to the definition of 'staged deep renovation' Art. 2
 (20) of the draft recast:
- 20. 'staged deep renovation' means a deep renovation carried out in several steps, following the steps set out in a renovation passport in accordance with Article 10, or, where such a renovation passport is not available for a building, in steps that achieve energy standards for building elements equal to at least those that are usually required to achieve deep renovation;



EPCs geared towards deep energy renovation: Additional policy recommendation 2)

- Draft recast of EPBD proposes 'renovation passport' : good!
- Also, defines 'staged deep renovation' in relation to renovation passport:
- However, needs time: start from 2025; and proposed as voluntary only
- Should be available for all buildings ASAP!

Policy recommendation for EPBD:

- add to the EPBD the following provisions:
 - New Art. 10 (4): Require Member States to ensure that all buildings, which were built before a national building energy code came into force that required at least low-energy buildings, and which are not renovated to close to an nZEB level have a Building Renovation Passport the latest by 2028.
 - Add to Art. 16 (4, 5): Member States shall ensure that the renovation recommendations on the EPCs are presented in a way consistent with a full Building Renovation Passport.



EPCs geared towards deep energy renovation: Additional policy recommendation 3)

- Draft recast of EPBD proposes primary energy as the main indicator
- However, with RES-based electricity: mixes envelope efficiency and decarbonized supply
- Split energy performance and climate performance indicators and classes!

Policy recommendation for EPBD:

- Require Member States to provide, on the EPCs, the below information:
 - 1) **heat/cold input demand** (kWh/m²/yr) for space heating and cooling and water heating plus electricity for lighting (non-res.) and ventilation, to inform about the efficiency of the building shell and the heat/cold/air distribution; => this indicator should become the basis for the **energy efficiency class** of the building; it is also an indicator of costs;
 - 2) **GHG emissions** (t CO_2 eq/yr) to inform about the climate impact of the building, as the result of both energy efficiency of the building shell and the heat/cold/air distribution, and the heating and cooling system(s) installed => the specific value (kg CO_2 eq/(m^{2*}yr)) should be the basis for a **new climate class** of the building; if that is not possible to agree, a second-best alternative could be non-renewable primary energy
 - 3) **final energy demand** (kWh/m²/yr and kWh/yr) and type of energy source, for **informing real estate transactions** and calculating energy costs

For all of these three terms, the **potential savings and changes** in the energy efficiency and climate classes from implementing a recommended combination of Deep energy renovation actions should be provided as well.



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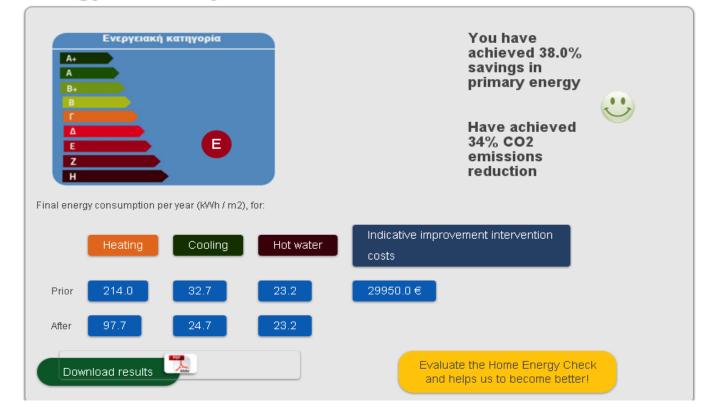


B) Online tool for to deep energy renovation recommendations

- For building owners: allowing "2nd opinion" on recommendations from an EPC, or "1st opinion" if no EPC exists
- Master tool based on the Greek Home Energy Check tool
- Results:
 - Estimate for current energy efficiency
 - Selection of renovation options (from *Priority A*)
 - Estimation of energy efficiency in case of renovation
 - Recommendation to obtain energy audit

Tool energy audit - Home Energy Check

Energy efficiency





B) Online tool for to deep energy renovation recommendations

Policy recommendation for EPBD:

In Art. 26 (2) of the draft recast: Require Member States to provide a high-quality energy calculation and recommendations tool for self-use, and to ensure that it is kept updated and that the renovation recommendations provided are consistent with deep energy renovation.

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C) Creating Deep Renovation Network Platforms

- Deep Renovation Network Platform =
 One-stop shop (OSS) for building owners willing to renovate
 plus Networking Platform for renovation supply-side actors and their joint
 communication/marketing
- Will help building owners take the steps needed for renovation after/based on the EPC => Green paper identified 15 potential services with list of content, including information on and link to EPCs, and recommendations from priority A)
- Can take different forms (online platform or physical hub; information OSS and networking only; active coaching of renovations; organising implementation)
- Policy proposal:
 combine 1) national level online platform for information OSS and networking and
 2) support for network of local/regional physical hubs for local networking,
 marketing of renovation, and active coaching of renovations



C) Creating Deep Renovation Network Platforms

Policy recommendation for EPBD:

- add to the EPBD (Art 15 (6) of the draft recast) the following provision:
- "These technical assistance facilities, including one-stop-shops, shall be established
 in the forms of both an online platform at the national level and a network of
 local or regional physical hubs, and be endowed with sufficient resources to
 actively reach out to at least 5 % of building owners each year."



D) Regular mandatory EPC assessor training

Policy proposal: mandatory *periodic* training or examination for *maintaining* certification and registration as an EPC assessor after a validity period

General framework

- Regularity: periods of 3-5 years
- Form:
 - Training courses
 - Workshops/ seminars
 - Verification of issued EPCs
- Workload to be determined on national level

Training content

- Changes in national or EU Building Performance Acts
- State-of-the-art technology, esp.
 deep energy renovation options
- Common mistakes, general learning
- Funding programs for energyefficient renovations
- Contract design



D) Regular mandatory EPC assessor training

Policy recommendation for EPBD:

add to the EPBD (Art 22 of the draft recast) the following provision:

Require the Member States to require *either* an initial and **regular training** *or* an initial and **regular examination** of EPC assessors as the precondition to be certified or accredited and registered as an EPC assessor.

Renovation recommendations consistent with deep energy renovation (QualDeEPC priority A) should be a special focus.



F) Voluntary/mandatory advertising guidelines for EPCs

Policy proposal for features of guidelines to ease compliance for building owners:

Content-related guidelines Publication -related guidelines Specify EPC content that should be displayed across all media: at least • Provide publication parameters for displaying the EPC content such as energy class, colour, and specific energy consumption (primary or size, colours, background, pixels, final as displayed on the EPC); in some countries also CO₂ emissions and typography. Specify medium-specific EPC content that should be displayed in various media, such as print (especially small text in newspapers and Provide softcopies of the EPC magazines), digital and internet, audio-visual. content, especially for digital media URL to the EPC or EPC number should be provided, when possible, especially if EPCs are in public domain Provide graphical and text examples of advertisements for The entire energy label that shows the building's energy class various media concerning the entire spectrum of energy classification should be shown, when possible, especially in digital media

Also, proposed legal text if a country wishes to make use of the guidelines mandatory



F) Voluntary/mandatory advertising guidelines for EPCs

Policy recommendation for EPBD:

add to the EPBD (Art 17 (4) of the draft recast) the following provisions:

Require the Member States to create easy-to-use advertising guidelines, communicate the existence and usefulness of the guidelines widely and actively, and to consider making the use mandatory.



G) Improving compliance with the mandatory use of EPCs in real estate advertisements

Policy proposal drafted for instruments further to advertising guidelines (*priority F*)

| Way to improve compliance | Description |
|----------------------------------|---|
| Appointment of nodal | Appoint the same nodal authorities for compliance verification with the |
| authorities | mandatory use of EPCs in real estate advertisements. |
| Resources and competences | Adequate financial resources and manpower |
| Check advertisements for | A random checking mechanism for real-estate portals etc., similar to |
| compliance | quality control of EPCs, could be adopted. |
| Methods of enforcement | Awareness campaigns should be conducted targeting various |
| (passive): raising awareness | stakeholder groups to sensitize them regarding the mandatory use of |
| | EPCs in real-estate advertisements and appraise them of the guidelines |
| | for advertising, and penal provisions for non-compliance. |
| Methods of enforcement (active): | Levy staged penalties for non-compliance, starting from re-sensitizing, |
| penal provisions | warning, and up to monetary penalties, depending on the relative |
| | importance of the stakeholder group and their reach. |



G) Improving compliance with the mandatory use of EPCs in real estate advertisements

- Art. 17 on Issue of energy performance certificates includes new provision in paragraph 4., equivalent to one of our suggestions:
- "Member States shall carry out sample checks or other controls to ensure compliance with these requirements."

=> Policy recommendation for EPBD:

- add to the EPBD (Art 17 (4) of the draft recast) the following three further provisions:
- Require Member States to
 - Appoint a nodal authority with sufficient resources and the mandate to perform the random checking and the following measure:
 - Raising awareness of the duty to display EPC energy data/class in real estate advertisement, and of the advertisement guidelines (priority F)
 - Define staged penalties for non-compliance.

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QUESTIONS?

HIGH-QUALITY ENERGY PERFORMANCE ASSESSMENT AND CERTIFICATION IN EUROPE ACCELERATING DEEP ENERGY RENOVATION

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www.twitter.com/QualDeEPC
www.linkedin.com/company/qualdeepc

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E) High user-friendliness of the EPC – proposed template



| Registr | y no.: <i>123456</i> | 5789 | | | D/MM/Y | | El | PC type: e.g. asset rating | | |
|-------------------------------|-----------------------------|---------------------------------------|-------------------------|--|------------------------------|--|-------------------|---|--|--|
| | 0 | ther requirer | | | om the date of S standard | | on me | thod | | |
| Building o | lata | | | | | | | | | |
| | | | e.g. multi-family home, | | | | | | | |
| ddress | | | | | | | | | | |
| Additional sp | ecification of | building e | e.g. nine apartments; | | | | | | | |
| Year of construction | | | | | | | | Current picture of building | | |
| Area | | | | | | | | | | |
| Additional va | ılue | | | | | | | | | |
| nergy cla | ssification | and perfe | ormar | nce | | | | | | |
| nin <i>Value</i> kWh/m²yr] | maxValue [kWh/m²yr] | Energy class | ; 1 6 | l st value, e energy [kW | r.g. Primary h/m²yr] | 2 nd value, e. ergy [kWh/n | .g. find n²yr] | nl en- "improved value" for Main Option*[kWh/m²yr] | | |
| | | A+ | | | | | | | | |
| | | A B | | | | | | 224 | | |
| | | С | | | | | | 234 | | |
| | | D | | | | | | | | |
| | | E | | | | | | | | |
| | | F | | | 987 | | | | | |
| | | G | | | | | | | | |
| | | Н | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| CO ₂ -/GHO | G-emissions [| kg CO ₂ /(m ²) | vr)]: | | | | | | | |
| | enovation recomn | | | ation schem | e for the Mair | option are giv | ven on p | o. 3 & 4. | | |
| atautial fin | | : (| | | - 4 - 4 h - N | ain Ontion | | VV7 LV4/L/ | | |
| | | | | | | | | XYZ kWh/yr | | |
| otential sav | vings of CO ₂ -/ | GHG-emissi | ions acc | ording to | the Mair | Option: | | ABC kg CO ₂ / yr | | |
| ssuer | | | | | Date | | | | | |
| | | | | | Signat | | | | | |

| nerg | | | | | | | |
|---|--|------------------------|----------------|---|---------------------------------------|-----------------------|-----------------------------|
| | gy consumption** | | meas | sured: | r | modelled ¹ | ***: |
| No. | Period of measure- ment (from – to) | Energy source | heating | consumption and domesti [kWh/yr] | | Electricit [kWh/yr | |
| | | | Total | Heating | DHW | | |
| 1 | | | | | | | |
| 2 | | | | | | | |
| 3 | | | | | | | |
| cupant | red energy consumption deper s, as well as the number of occ | upants. Also, the wea | ther condition | ventilation system ons during the period | (inkl. windows) a od of measuremen | nd domestic h nt; | ot water system of building |
| *mode | lled energy consumption may | differ from actual use | | | | | |
| sses | sment of building | envelope a | nd tech | nical syster | n | | |
| Build | ding envelope | Area [m²] | Desc | ription or Avg | . U-value [W | //m²K] | Energy rating ⁸⁸ |
| | | | | | | | |
| | | | | | | | |
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| | | | | | | | • |
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| Doors Groui unhe | | Year of co | | | ce, provided | power, | Energy rating*** |
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| Doors Groui unhe T ech Heati | s/Gates nd floor or floor to ated basement inical systems | | | | | power, | Energy rating" |
| Doors Groun unher Tech Heati Dome | of Gates and floor or floor to ated basement anical systems ang system | | | | | power, | Energy rating** |
| Doors Groun unhea Tech Heati Doma Venti | s/Gates and floor or floor to ated basement anical systems ang system astic hot water | | | | | power, | Energy rating ^{#8} |
| Doors Groui unhes Tech Heati Dome Venti | d floor or floor to ated basement inical systems ng system estic hot water lation system | | | | | power, | Energy rating ^{en} |
| Doors Groui Inhes Fech Heati Dome Venti | d floor or floor to | | | | | power, | Energy rating ^{en} |

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E) High user-friendliness of the EPC – proposed template





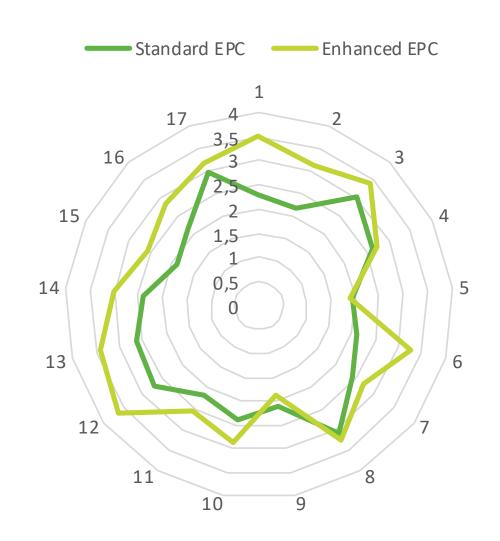
| Renovation recommendation | ns – renovation concepts | į |
|---|---|----------------|
| Description of useful combination of | of renovations and stepwise implementation for the | e Main option: |
| | | |
| | | |
| | | |
| | | |
| Economic result (e.g. payback time, o | ptional): | |
| | | |
| | Nearly zero energy buildings in case of renovation: Air tightness: | |
| | | |
| | Min. 50% RES or equivalent measures: | |
| Description of useful combination tion options not included in the Ma | of renovations and stepwise implementation for fu | urther renova- |
| tion options not included in the Ma | аш орион: | |
| | | |
| | | |
| | | |
| | | |
| Further information | | |
| The following link(s) provide furth | er information on energy performance certification | |
| The following link(s) provide furth | er information on energy performance certification y performance including financial assistance progra | |

What do building owners and stakeholders say?



Results from testing 98 buildings, survey of representatives, and roundtable discussions

- Enhanced EPC scored better on almost all questions (exception: comparison with other buildings)
- Highest improvement on:
 - 1 The EPC gives an overview of the strengths and weaknesses of the building's energy performance (=> traffic light system)
 - 2 The information in the EPC is presented in understandable language and figures
 - 6 The energy efficiency potential of my building is clearly shown
 - 12 The EPC clearly shows what energy efficiency measures should be implemented in my building

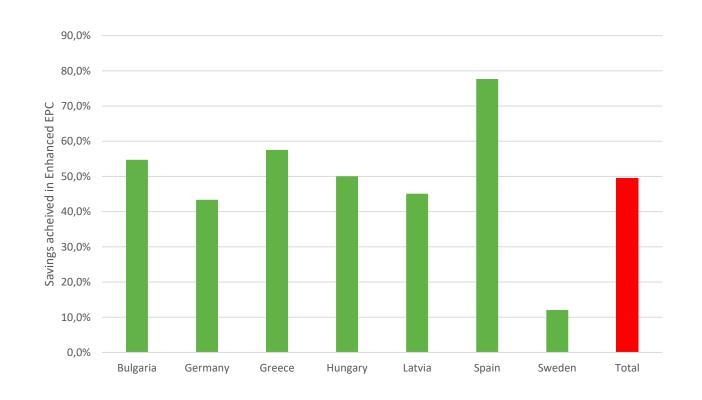


What about deep energy renovation?



Results from testing 98 buildings (residential and non-residential)

- Enhanced EPCs included more recommendations (between 3 and 6)
- Savings from main option were higher than in standard EPCs and average almost 50%, see figure
- Exception for both: Bulgaria and Latvia (standard EPC is already based on detailed energy audit)
- Numbers of recommendations and savings could be even higher with clearer guidance to EPC issuers
- E.g., Swedish partner used narrow definition of cost-effectiveness (but Sweden also has efficient buildings)



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C) Creating Deep Renovation Network Platforms

Overview of the concept of a deep renovation network platform (basic version, selection)

| Services/products | Description of services | Minimum version |
|--|---|---|
| 1. Information on renovation actions1.1 General information | Providing general information and other benefits due to renovation Providing information on principles of insulation, heating, cooling, and ventilation systems, renewable energies descriptive texts and graphics on the website with information text and graphic documents downloadable as pdf-documents | a building insulation |
| 2.2 Linking with building deep renovation roadmap and possibly a passport | Linking EPC information to detailed analysis to upgrade it to a Building deep renovation roadmap Possibly development of the content and form of the "Building Passport" for bringing together the history of a building and the information tied to it (roadmap, energy audits, energy-saving works and/or restoration works) | Links to further information about the roadmap/passport Energy efficiency of buildings |
| | • | • |