



# 6<sup>TH</sup> EUROPEAN ETICS FORUM 2022

ETICS for energy-efficiency

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# VIII INTERNATIONAL ETICS CONFERENCE 2022

## Fit-for-55: Decade of Action

## Summary

Despite all challenges and uncertainties:

- The political framework conditions have never been better.
- ETICS shall play a significant role in Europe's green energy transition.
- ETICS have proven their performances and durability in practice.
- ETICS are available to immediately reduce Europe's dependency on energy imports and to reduce CO2 emissions.

## Learning to fly

**Doubling the ETICS market is impossible?  
True?**

**Let's start believing in it – today!**

## Paris agreement

- **Legally binding** international treaty
- Adopted by 196 parties at COP 21 in Paris, on 12 December 2015
- Entered into force on 4 November 2016
- Reach global peaking of greenhouse gas emissions as soon as possible to achieve a climate neutral world by mid-century
- Long-term low greenhouse gas emission development strategies to be submitted by all **196 countries** by 2020

## COP21: Climate action urgently needed

**Objective of the Paris Agreement: limit global warming to well below 2°C, preferably 1.5°C compared to pre-industrial aera.**

## European Green Deal

- Announced by European Commission in 2019
- **EU's contribution** to Paris Agreement
- Striving to be the first climate-neutral continent
- Long-term **objectives**:
  - No net emissions of greenhouse gases by 2050
  - Economic growth decoupled from resource use
  - No person and no place left behind

## European Green Deal

Europe's contribution to achieve carbon neutrality by 2050.

## European Green Deal – more than a promise

- **Overall mission** of the von der Leyen Commission
- Understood: this **cannot** be achieved by a **single piece of legislation**
- **All European legislation** and initiatives must be **aligned** to achieve the ambitious objectives
- Every new initiative or revision of regulation or directives are checked if and how they contribute to the objectives
- Existing legislation reviewed and adjusted accordingly



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## European Green Deal – Action Plan

Among others:

- **Climate Law**, increasing the climate targets to **55% reduction of CO2 emissions** by 2030 compared to 1990 (was: 40%)
- Further milestones will be set by 2040 and 2050
- **Renovation Wave**: more than double renovation rates!
- Level(s): European framework for sustainable buildings
- **Fit-for-55** package (two packages)

Findings:

- **Much higher ambitions** as analysis showed that EU will fail achieving the -40% target, making it increasingly challenging to catch-up in the last two decades
- In addition: CO2 released in the atmosphere will not easily disappear

Annex to the Communication on the European Green Deal  
Roadmap - Key actions

Actions	Indicative Timetable <sup>1</sup>
<b>Climate ambition</b>	
Proposal on a European 'Climate Law' enshrining the 2050 climate neutrality objective	March 2020
Comprehensive plan to increase the EU 2030 climate target to at least 50% and towards 55% in a responsible way	Summer 2020
Proposals for revisions of relevant legislative measures to deliver on the increased climate ambition, following the review of Emissions Trading System Directive; Effort Sharing Regulation; Land use, land use change and forestry Regulation; Energy Efficiency Directive; Renewable Energy Directive; CO <sub>2</sub> emissions performance standards for cars and vans	June 2021
Proposal for a revision of the Energy Taxation Directive	June 2021
Proposal for a carbon border adjustment mechanism for selected sectors	2021
New EU Strategy on Adaptation to Climate Change	2020/2021
<b>Clean, affordable and secure energy</b>	
Assessment of the final National Energy and Climate Plans	June 2020
Strategy for smart sector integration	2020
'Renovation wave' initiative for the building sector	2020
Evaluation and review of the Trans-European Network – Energy Regulation	2020
Strategy on offshore wind	2020
<b>Industrial strategy for a clean and circular economy</b>	
EU Industrial strategy	March 2020
Circular Economy Action Plan, including a sustainable products initiative and particular focus on resource intense sectors such as textiles, construction, electronics and plastics	March 2020

<sup>1</sup> The Commission's work programme for 2020 will provide further clarity on the timing of relevant actions announced for 2020

2

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## Europe's building stock identified as key enabler

The building sector, currently responsible for 40% of final energy and 36% of greenhouse gas emissions in the EU, has a large cost-effective potential to reduce emissions. Today, 75% of the EU's building stock is energy inefficient<sup>5</sup>. Many homes are still heated with outdated systems that use polluting fossil fuels such as coal and oil. To fully tap into this potential for improvement would require the renovation rate, which is around 1% today, to double and more in the period up to 2030. In particular, deep renovations addressing building shells, smart digitalisation and the integration of renewable energy together need to increase strongly.

Source: Communication „Stepping up Europe's 2030 climate ambition”, COM(2020) 562, European Commission

👉 **With only 28 years left until 2050!**



## Fit-for-55 package

European Commission addressed numerous pieces of legislation to be elaborated or revised to align them with the new ambitions and to create consistent framework conditions

Among others:

- Revision of **Energy Efficiency Directive (EED)**:
  - aiming to increase the EU-level target for **energy efficiency** from 32.5% to **36%** for final, and 39% for primary energy consumption.
  - Strengthening the role of public authorities to lead by example: **3% renovation rate for public buildings** at all levels (was: only central government)

## Fit-for-55 package

- Revision of **Energy Performance of Buildings Directive (EPBD)**:
  - Definition of **Zero Energy Building**
  - Strengthening the role of **one-stop-shops**
  - European harmonization of **Energy Performance of Buildings Certificates**
  - Strengthening deep or staged **deep renovation**

## Fit-for-55 package

### ■ EU Taxonomy

- Primarily EU Taxonomy addresses stock listed companies, especially from the financial sector
- Mandatory from 2023: additional report about sustainability of business activities
- Idea: shareholders will invest in greener companies and thus drive the green transition from the demand side
- Banks and capital funds assess and classify their business cases preparing their report: less-green activities will be phased-out in the long run
- This **will impact investments in housing companies/funds, loans for companies** (e. g. higher interest rates for companies not green), etc.
- EAE commented on assessment criteria

## Fit-for-55 package

- Revision of **Construction Products Regulation (CPR)**:

- Aiming to overcome legal obstacles of the current CPR

Proposal includes:

- Inclusion of **environmental characteristics** in future European standards and Declaration of Performance (instead of Environmental Product Declaration)
- Declaration of **recycled content**

👉 **Sustainability & circularity aspects will gain much more attention**

👉 **Customers can demand “greener” construction products**

👉 **Already visible: green public procurement, EU Taxonomy, regional requirements, link to funding for building renovation**

## Fit-for-55 package

### ■ Social Climate Fund

- New emissions trading system for buildings and road transport **allocates** a total of **€72.2 billion** over the 2025-2032
- to provide support measures and investments to the benefit of vulnerable households
- Increase the **energy efficiency of buildings** (among others)

## Latest developments underlined the urgency of the topic

- Russian aggression against Ukraine
  - Demonstrating **vulnerability of energy supplies**
  - **Rocketing energy prices** further increase **energy poverty** in many Member States
  - Show unreliability of Russian politics (also applies to other countries)
  - The **EU imports 90% of its gas consumption**, with **Russia** providing around **45%** of those imports, in varying levels across Member States. **Russia** also accounts for around **25% of oil imports and 45% of coal imports.**

### 👉 RePowerEU initiative



## RePowerEU


- Seeking for short-term actions to significantly reduce EU's dependency on energy imports from Russia
    - Preferably **become** (almost) **independent** from Russian gas imports **in winter 2023**
    - Short-term measures to limit price increase for energy (e. g. national caps)
    - Support for vulnerable people
- 👉 [EAE position paper](#)



## EAE position on RePowerEU

- **Too much focus on supply side**
  - Replacing gas imports from Russia by imports from other countries will not help reducing CO2 emissions and dependency from imports
  - Shift to renewables alone will not be sufficient
- **Reminds EC and Member States of energy-efficiency (demand side)**
  - Short-term action must not undermine long-term objectives
  - **Efficiency first** needs to remain the guiding principle
  - Reducing the demand first will ease energy transition to renewables
- EAE co-signed Renovate Europe position paper
  - ☞ **Contact your ministries and Members of European Parliament!**

EAE position on RePowerEU  
ENERGY-EFFICIENCY IS EUROPE'S FIRST FUEL



EAE reminds of the role energy-efficiency must play

EAE, the European Association for External Thermal Insulation Composite Systems (ETICS), welcomes the European Commission's initiative taking immediate action to reduce Europe's dependency on energy imports and thus to improve its energy security. Already in EAE's Energy Saving Guide 2016 we raised this point and requested to strengthen efforts to improve the energy-efficiency of our economies and societies.

Unfortunately, latest geopolitical developments demonstrate the urgency of the topic. Although EAE members fully support the need to take immediate action, concerns are that measures will too much focus on ad-hoc measures to replace one source of energy by another whilst contradicting the efficiency first principle. This is why we support the proposals of the Renovate Europe Campaign and call on the European Commission and Member States to take people's awareness as an opportunity to accelerate Europe's energy transition via both: significantly improving energy-efficiency and replacing the residual lower demand by renewable energy sources.

In particular the European Commission and Member States should check and re-adjust legislative proposals, national Recovery and Resilience Plans and National Building Renovation Plans (formerly: Long Term Renovation Strategies) considering the following aspects:

- **Energy-efficiency is Europe's first fuel** as the aging building stock accounts for around 40% of Europe's energy demand and CO2 emissions.
- **Scale up ambitions** to achieve Europe's energy transition.
- Consider the role of social housing to **reduce energy poverty** as those buildings are typically occupied by vulnerable households suffering most from rocketing energy prices. Make sure that no one is left behind.
- Strengthen the role of **one-stop-shops** to make access to both financial and technical support as convenient as possible for building owners to lower the barriers to renovation.
- Promote deep or staged **deep renovation**; individual building renovation roadmaps might offer technical guidance towards carbon neutrality both in terms of technical and economical feasibility.
- **Avoid lock-in effects**: building renovation is a once-in-a-lifetime opportunity. Measures taken today will be in place in 2050.
- **Raise the awareness** of private property owners for the benefits of energy-efficiency renovation by media campaigns and offer funding for energy audits and individual building renovation roadmaps that guide building owners.
- **Support system loyalty** in case of kits used to improve thermal insulation and **construction supervision** to guarantee long-term performance of installed solutions; deploy full funding only if quality criteria can be proven.
- Give building owners a **reliable long-term perspective**: continuity and transparency in funding schemes, schedule for enforcements of energy-performance requirements are key to allow for staged deep renovations for those who cannot afford deep renovations in one stage. Only then building renovation roadmaps can deploy their full potential.
- **Reliable framework conditions** are also key to all parties along the construction value chain: uncertainties are barriers to invest in capacity building both in regard to material supplies and skilled workforce.

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**ETICS are amazing!**  
Good for the environment, the economy and the people.



## Latest developments underlined the urgency of the topic

- UN scientific research showed
  - **Climate limit of 1.5C close to being broken**
  - Probability of one of the **next five years** surpassing the limit is now 50% (was 20% in 2020 and 40% in 2021)
  - The global average temperature was already 1.1C above pre-industrial levels in 2021

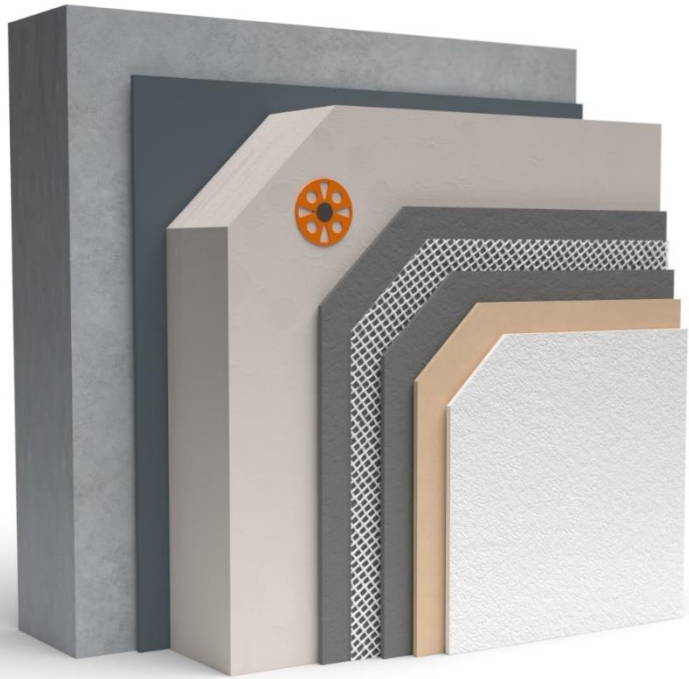
Source: The Guardian, 9 May 2022

## Climate limit of 1.5C close to being broken, scientists warn

**The probability of one of the next five years surpassing the limit is now 50%, up from 20% in 2020**



Water rises near the Eiffel Tower as the Seine river's embankments overflowed after days of heavy rain in Paris, France, June 2016, during the hottest ever on record. Photograph: Chesnot/Getty Images



# Let's take joint action!

Challenges of today are opportunities of tomorrow.

## Overall framework conditions provide great perspectives

- **Energy-efficiency** high on the political agenda
- Politics understood **renovation** of building stock offers a huge leverage to achieve carbon neutrality
- Whilst contributing to other important objectives
- **Huge budgets** will be made available in coming years

However...

- This is not paradise - **it will not come from alone.**
- **WE** will need to **take joint action**, demonstrating that the **ETICS sector is willing** and able **to deliver!**

👉 **Each challenge bears opportunities.**

👉 **Now is the time to plant what we want to harvest in future!**



## Holistic approach needed

- **Product design**
  - Ready to removal & recycle
  - Reducing embedded carbon in production
  - Maintenance & ETICS-on-ETICS application further increase the lifecycle
- **Building design:** ETICS need to be assessed in the context of the entire building design
  - Considering their CO2 savings in use period
  - Considering their superb durability and lifespan
- **Removal, reuse & recycling**
  - Improve technologies for removal, sorting & recycling

# ETICS & Circular economy

Let's close the loop. And make ETICS even more sustainable & recyclable.



## Fruits for thought

### Capacity building needed, examples:

- Increasing circular economy in various sectors will create new sources of supply for **raw materials**.
- **Train & educate** skilled staff of sectors that will deploy staff during the transition into a green economy (e. g. coal mining, car industry & their suppliers, ...).
- Consider “low level approaches” to **generate immediate effects**, e. g. modular training schemes for workers & craftsmen.
- Scale-up **production capacities** by anticipating future demands.
- Pre-fabrication to bridge capacity shortages on site.

## Overcome shortages

Let's turn challenges of today into opportunities of tomorrow.





## Ideas

- ETICS contribute to **wellbeing** of inhabitants and users of buildings.
- ETICS **upgrade** and preserve the value of real estate.
- ETICS offer an **unbeatable variety** of technical and aesthetic options for architects & designers.
- Individual renovation roadmaps guide building owners to **deep or staged deep renovation**.
- **One-stop-shops** as single contact for private owners to technical assistance, energy consultancy and access to financial assistance.

**Make ETICS renovation  
desirable**

**ETICS are highly attractive. Lower the barrier  
to invest.**



Happy to see your applications for the 2023 awards!



Make ETICS renovation  
desirable

ETICS are amazing! Aren't they?

## Stronger together

- **SSO** has well established as the **voice of the Polish ETICS sector** to promote industry's interests on the national level.
- **EAE** is the **voice of the ETICS sector on European level**, proud having SSO as an important member.
- Overarching policies often start on European level; getting **involved at an early stage** is key (e. g. EN 17237)
- **Implementation** requires national partners (national application rules).
- Sometimes **alliances** aim as a leverage, e. g. Renovate Europe Campaign (with national partners), Construction Products Europe to have an even stronger voice.
- Renewables (e. g. heat pump industry) might have **shared interests** as they can deploy their full potential only with well performing envelopes.

**Build alliances on different levels where appropriate**

**Advocacy is needed to give ETICS and building renovation a voice.**



## Conclusions

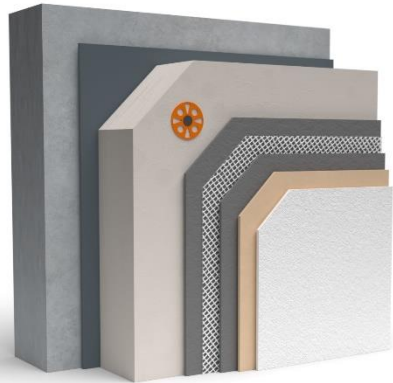
- Framework conditions have **never been as good as today**.
- Surely, some aspects remain challenging.
- Let's take care we **keep quality levels high**:
  - System loyalty is key.
  - Shortages must not harm the positive ETICS image.
- The **real competitors** are competing technologies, especially from the **supply side** (e. g. “green hydrogen”).
- The **ETICS sector stands ready** to take the challenge.

👉 **I count on your valuable support!**

👉 **Happy to assist whenever needed.**

**Are you ready for take-off?**

**With joint action we can create a decade of growth. Let's do it!**



**ETICS ARE AMAZING!**

**Good for the environment, the economy and  
the people.**