



# EUROPEAN STRATEGY FOR THE ENERGY TRANSITION OF BUILDINGS



13/09/2023




## **ABOUT THE OID & ESREI**



# MISSIONS OF THE OID



At the center of our approach, think of a responsible real estate to:

- Bring together **real estate professionals** from all areas of expertise,
- **Push forward** environmentally committed professionals,
- Place **ESG issues** at the heart of real estate strategies,
- Identify and encourage **emerging topics**,
- Identify and share **best practices**,
- Provide a **resource center** : 
  - *Studies*
  - *Benchmarks*
  - *Regulatory monitoring and deciphering*
  - *News and articles (on the OID website)*



**OID is a nonprofit organisation recognised as an association of common interest, a recognition for the work accomplished since 2012 !**



# OUR MEMBERS





# MAIN ACTIONS OF THE ESREI PROGRAMME

Our European sponsored programme, **European Sustainable Real Estate Initiative**, aims at **extending our actions to Europe** and **help paneuropean real estate actors** in the integration of European challenges in their work.

**PROVIDE** a technical and regulatory watch in European countries and at the level of the European Commission

**PRODUCE** benchmarks of real estate sustainable issues (GHG Emissions, Energy Performance Certificates, Decarbonisation pathways, NZEB standards, ...)

**CREATE** a network of European real estate actors





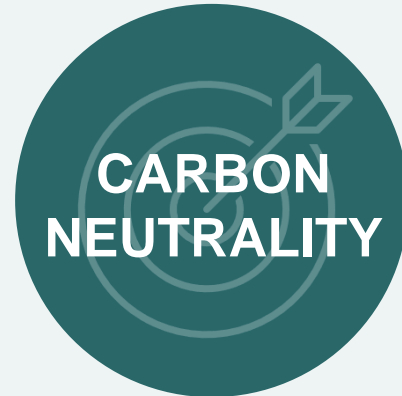
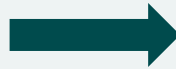
# **BUILDINGS IN EUROPE: KEY FIGURES**



# EUROPEAN GOALS FOR DECARBONISATION



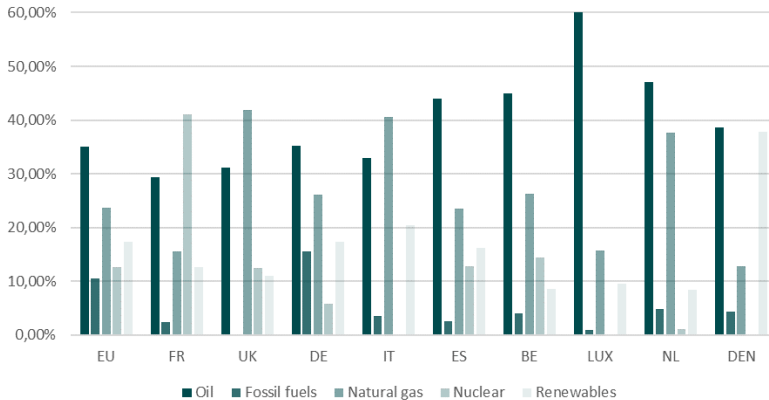
**Reduction of GHG emissions by  
2030 compared to 1990  
(expected by the Fit for 55 Plan)**



**By 2050, for all sectors and  
countries (expected by the  
European Green Deal)**



# A DIVERSE ENERGY LANDSCAPE



Energy Mix 2020  
(All sectors)

## SEVERAL OBSERVATIONS:

- **Luxembourg** = 60% oil in the energy mix
- **Germany** = about 20% fossil energy in the energy mix
- **United Kingdom** = 40% natural gas in the energy mix
- **France** = 40% nuclear in the energy mix
- **Denmark** = about 40% renewable energy in the energy mix





## BUILDINGS IN EUROPE: KEY FIGURES

**40%**

Final energy  
consumption



**36%**

Greenhouse  
gases  
emissions



**1%**

Renovation  
rate



**75%**

Energy-  
inefficient  
buildings





# **REGULATORY AMBITIONS**



# BUILDING SECTOR'S OBJECTIVES

## Renovation Wave

- Announced in October 2020
- Foster deep renovations in more than 35 million buildings

## Renewable Energy Directive

- Provisional agreement on March 2023
- 42.5% of renewable energy in the European energy mix by 2030

## Energy Efficiency Directive

- Recast in July 2023
- Reduction of final and primary energy consumption in Europe by 2030
- Building sector highlighted as one the three high priorities sectors
- 3% of public buildings must be renovated each year

**x2**

The annual  
renovation rate  
of the stock by  
2030

**42%**

Renewable  
energy in the  
EU energy mix  
by 2030

**-38%**

Of final energy  
consumption by  
2030



# THE EUROPEAN IMPULSE : THE EPBD

## Energy Performance of Buildings Directive

- **Recast** adopted by the EU Parliament in **March 2023**
- **Minimum Energy Performance Standards (MEPS)** for new and existing buildings
- Standards shifting **from NZEBs to ZEBs**
- **Deep renovations:**
  - Efforts to **reduce whole life-cycle greenhouse gas emissions** generated during the renovation
  - Focuses on **wall, roof and low floor insulation, external joinery, ventilation, heating and thermal bridges**, to ensure the necessary comfort in summer and winter
  - OR renovation resulting in a **reduction of at least 60 % primary energy demand** for worst-performing buildings for which it is not feasible to achieve a ZEB standard, and which transforms a building in **NZEB before January 2027, and in ZEB after January 2027.**

## Energy Performance of Buildings Directive

January 2026



New public buildings must be **ZEBs**

Up to end 2026



**Deep renovations** must transform buildings into **NZEBs**

January 2027



- Public and **non-residential** buildings must be rated **A to E**
- **Deep renovations** must transform buildings into **ZEBs**

January 2030



- Public buildings and **non-residential** buildings must be rated **A to D**
- **Residential** buildings must be rated **A to E**

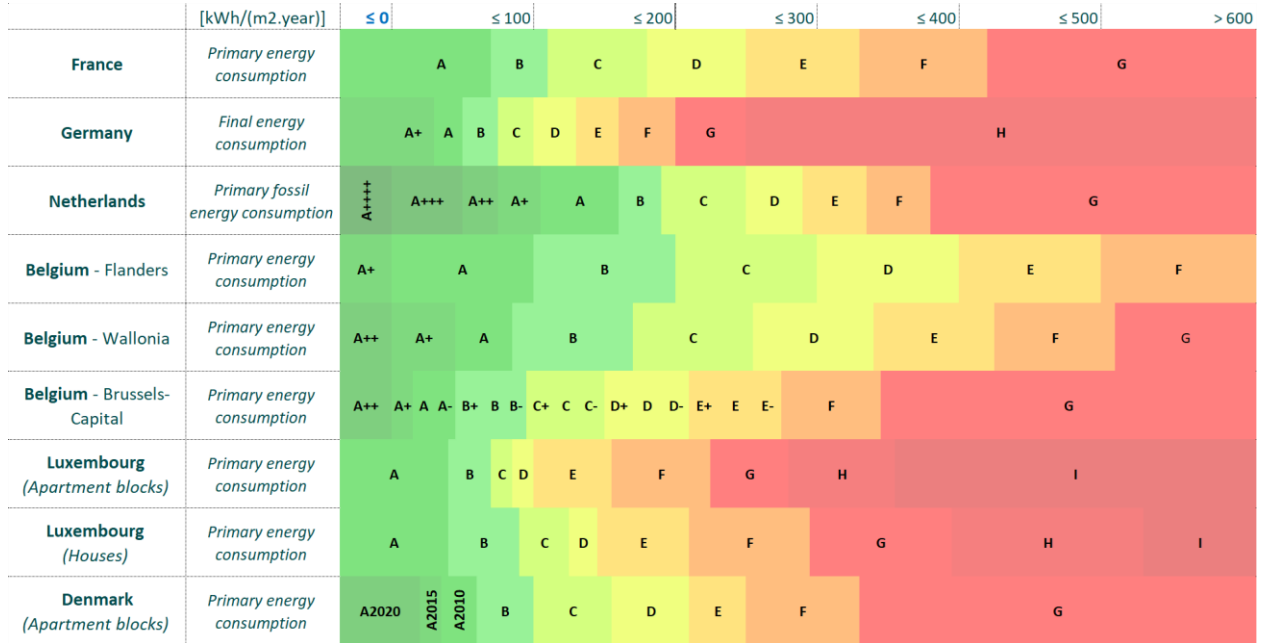
January 2033



**Residential** buildings must be rated **A to D**



# THE HARMONISATION CHALLENGE



EPC for housing buildings across Europe



**THANK YOU FOR YOUR  
ATTENTION**

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