Technical Assistance: the Wealth-enabler for Buildings

28 September 2021, 10:30-11:50, via GoToWebinar

SPEAKERS:
- Mathieu Fichter, DG REGIO
- Kaspar Richter, DG REFORM
- Mariangela Luceri, FEDARENE
- Caroline François-Marsal, Caisse des Dépôts Group
- Jessica Glicker, BPIE

Moderator: Adrian Joyce,
Campaign Director, Renovate Europe

#Renovate2Recover
#BoostRateandDepth

In collaboration with:

[Logos of Caisse des Dépôts Groupe, FEDARENE, and ENERGYCITIES]
Opening and Guidance

Adrian Joyce
Director of the Renovate Europe Campaign

GoToWebinar – 28/09/2021
LAUNCH OF THE POLL:
What does Technical Assistance mean to you?
(Choose one option)

- Targeted aid with the analysis of barriers and needs
- Engineering and project advice for local authorities
- External expert help with the design of renovation programmes
- Explanation and sourcing of funding opportunities
- Boosting the number and skills of personnel
Learnings from the MFF: How and why to prioritise Technical Assistance in rolling out renovation schemes

Presentation by
Mathieu Fichter,
Directorate-General for Regional and Urban Policy (DG REGIO), European Commission
Learnings from the MFF: How and why to prioritise Technical Assistance in rolling out renovation schemes

Mathieu Fichter
EUROPEAN COMMISSION
Directorate General Regional and Urban policy
REGIO G1 - Policy officer Energy
Lessons learnt

• The ‘Renovation Wave for Europe’ : underlines key role of technical assistance to boost deployment of renovation

• A decade of Cohesion policy support to building renovation shows:
  • Money not enough! Lack of capacities, expertise & skills often central hurdle to large scale renovation programmes
  • Diversity of TA needs (administrative/financial/project pipeline/regulatory…)
  • TA to be fully integrated in energy efficiency strategy (not just a side point)
  • Look at sectoral TA (building renovation) in combination with horizontal TA
  • Need for tailormade support
  • It takes time to implement TA & see results  BUT it works!
Why looking at TA for building renovation?

- Overcome the many capacity related issues on building renovation
- What needs to be delivered is very ambitious – business as usual clearly not sufficient
- Doing nothing not an option: ‘natural’ improvement of capacities will take much too long
- Avoid missing available finance (public & private) due to inadequate/lack of capacities
- Need to keep all organisations/stakeholders up to latest developments (new regulations, new financial approaches, new technologies/materials…)
Towards successful building renovation

Finance: public & private

Project pipeline

Capacities: in public bodies & private sectors

Enabling framework (regulations, rules...)

Partnerships of involved stakeholders

‘Inclusive’ building renovation: working with people

Social dimension: ‘just transition’ = leaving no one behind

DEPLOYING BUILDING RENOVATION

TA Support

TA Support

TA Support

TA Support

TA Support

European Commission
How to go ahead?

• Need for thorough analytical review: identification of capacity issues & responsibilities (involve all levels of gvt & stakeholders)

• Close partnership with key actors of the renovation project cycle

• Develop strategic approach to capacity building in very close link with overall building renovation strategy

• Anticipate needs to keep up with fast evolving legislations & market

• Pilot/test and replicate at larger scale, for instance support to local levels

• Disseminate TA indirectly up to households – one-stop-shops on building renovation
How to go ahead?

• Set priorities:
  • TA for administrations? At which levels?
  • TA on financial aspects?
  • TA for SME’s in construction sector?
  • Capacity building of partners?
  • TA related to specific funding streams (like EU funding)?

• Reality check about appetite & readiness to take-up technical assistance

• Work with/partner with other MS/regions/local authorities to benefit from lessons learnt & transfer of knowledge & know-how

• Use EU technical assistance support
EU technical support linked to building renovation

- Commission’s Technical Support Instrument (TSI)
- JASPERS (Joint Assistance to Support Projects in European Regions – EC/EIB)
- InvestEU advisory Hub
- FI Compass platform
- ELENA
- Horizon2020 EUCity facility & Smart Cities Marketplace
- Private Financing for Energy Efficiency (LIFE)
- European Urban Initiative
• More emphasis on capacity building in 2021-2027

• TA for what?
  • necessary for the effective administration and use of the Funds, including for capacity building of the partners,
  • for carrying out functions such as preparation, training, management, monitoring, evaluation, visibility and communication etc.

• Novelties: Flat rate TA / Financing not linked to costs / Roadmaps for administrative capacity building

• Specific support on building renovation with Cohesion policy under the ‘Renovation wave’ flagship of the TSI

• Preparation of a new TA scheme with the World Bank focused on building renovation through Cohesion policy
Cohesion policy TA allocations*

- ERDF: 3.5%
- Cohesion Fund: 2.5%;
- ESF+ support: 4% and for programmes under Article 4(1)(xi) of the ESF+ Regulation: 5%;
- ERDF, ESF+ and Cohesion Fund, where total amount allocated to a MS under the Investment for Growth & Jobs goal does not exceed EUR 1 billion: 6%;
- EMFF support: 6 %;
- outermost regions programmes under IfGJ goal: + 1% point.

*) For real-cost TA these are maximum allocations
The practical toolkit

The toolkit is designed to provide inspiration for those seeking to develop the roadmaps.

It must not be regarded as a formal set of guidelines containing legal interpretation of the cohesion policy regulations 2021-2027.

Therefore it cannot be used by auditors to define eligibility.

THANK YOU!
Applying for EU Technical Support to implement the Renovation Wave: Technical Support from DG REFORM

Presentation by
Kaspar Richter,
Directorate-General for Structural Reform Support (DG REFORM), European Commission
The EU Technical Support Instrument
Support to the renovation wave

28 September 2021, Renovate Europe Webinar

Kaspar RICHTER, DG REFORM
What is the Technical Support Instrument?

- Successor of the Structural Support Reform Programme 2017-2020
- Higher budget: **EUR 767 million for 7 years, around EUR 110 million/year**, in constant prices
- Provides **tailor-made technical expertise** to EU Member States to **carry out reforms**
- No financial flow towards the Member State and **no co-financing required**
- The support is **demand driven**
- Covering **any stage of the reform** (design, implementation, evaluation)
- Technical support is an **important pillar of the EU recovery**
Wide range of reform areas covered

- **Green transition**
- **Digital transition**
- **Health and long-term care**
- **Skills, education and training**
- **Governance and public administration**
- **Competitiveness**
- **Financial sector and access to finance**
- **Revenue administration and public financial management**
- **Labour market and social protection**
How does the Technical Support Instrument work?

1. Submission of requests for technical support by Member States
2. Selection of requests
3. Provision of technical support

**Direct provision**
- European Commission’s in-house expertise

**Indirect provision**
- Other international organisations
- Member States’ experts
- Private sector experts
Timeline

**Spring – early autumn**
- Preparatory work on requests

**Nov – Dec**
- Analysis and selection of requests

**As of spring**
- Projects launched on the ground

**As of Jan**
- Design projects and mobilise expertise

**31 Oct**
- Deadline for submission of requests

- Strategic discussions on reform priorities
- **Drafting of request** by beneficiary Ministries/authorities
- Informal discussion with DG REFORM
- Beneficiary Ministries/authorities submit the request to National Coordinating Authority
- National Coordinating Authority prioritises the requests
Our work on renovation – some examples

- Public building investment programme in Ireland
- Innovative assessments of public real estate investments in Italy
- Public building energy efficiency plans and energy registry in Greece
- Energy efficiency awareness raising strategy in the Czech Republic
- Support on heating and cooling strategy in Slovenia
- Roadmap for scaling up energy efficiency in buildings in Hungary
- Energy efficiency expert platform in Poland
Technical Support Instrument 2022 – Flagship technical support projects
Flagship technical support projects

• 13 projects proactively proposed by DG REFORM to facilitate the design and implementation of reforms that:
  • Are largely needed across Member States
  • Meet a top EU / Commission priority
  • Are designed in a way that can be easily fitted to various national contexts
  • Their uptake is voluntary
  • May be requested individually by Member States or jointly as a multi-country project
  • May comprise technical support modules that you can opt in and that will be tailored-made to your national context
TSI 2022 Flagship – support to the renovation wave

• The flagship technical support facilitates:
  
  • Implementing the EU Renovation Wave and national long-term renovation strategies
  
  • Deploying cohesion policy funding, one of the main EU funding instruments for renovation

• Impact objectives:

  Overcoming barriers to building renovation, including administrative capacity constraints

  Contributing to job creation, to EU’s climate objectives, and to reducing energy poverty through effective renovation policies

  Making the most of cohesion policy funding for renovation: tapping this large source of funding to boost building renovation
The flagship suggests **three activity packages** tailored to the national and local contexts. As relevant and requested, different types of support could be combined in the same support package.

**BUILDING RENOVATION POLICIES**
- Support to policies in areas such as **energy poverty**, **public buildings**, and **sustainable renovation** (circular economy, skills, lifecycle emissions, climate resilience, digitalisation, etc.):
  - Analysis of administrative, financial and regulatory barriers
  - Design of measures and action plans, including for attracting financing and project pipeline development
  - Capacity building

**COORDINATION MECHANISMS**
- Support for an effective **governance** of the long-term renovation strategies:
  - Stakeholders map
  - Analysis of capacity constraints and existing coordination mechanisms
  - Recommendations for an effective and inclusive coordination mechanism, including possible e-government solutions
  - Capacity building

**COHESION POLICY FUNDING FOR BUILDING RENOVATION**
- Support to successful implementation of the **2021-2027 cohesion policy programmes** on building renovation:
  - Analysis of barriers and needs
  - Action plans for relevant authorities and other actors
  - Advice for implementation of the action plan, including support in developing methodologies
DG REFORM and TSI – more information


3. Request templates for renovation wave flagship - [https://ec.europa.eu/info/sites/default/files/flagship_renovation_wave_1.docx](https://ec.europa.eu/info/sites/default/files/flagship_renovation_wave_1.docx)


For any question and discussion of technical support ideas please contact us:

REFORM-B3@ec.europa.eu
Applying for EU Technical Support to implement the Renovation Wave: European City Facility: Stimulating local investments in the energy transition

Presentation by
Mariangela Luceri,
European Federation of Agencies and Regions for Energy and Environment (FEDARENE)
European City Facility.
Stimulating local investments in
the energy transition

Mariangela Luceri, FEDARENE

@euicityfacility

This project has received funding from the European Union’s Horizon 2020 research and innovation programme under grant agreement No 864212
EUCF objectives

- Provide technical, legal and financial expertise
- Deliver more than 200 investment concepts
- Build capacity of more than 400 municipal staff
- Facilitate access to private & EU finance and advisory services
EUCF Regional Approach
3 regions, 31 countries

NORDIC COUNTRIES & WESTERN EUROPE
Austria, Belgium, Denmark, Finland, France, Germany, Iceland, Ireland, Liechtenstein, Luxembourg, Netherlands, Norway, Sweden, United Kingdom

CENTRAL & EASTERN EUROPE
Bulgaria, Croatia, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Slovenia and Slovakia

SOUTHERN EUROPE
Cyprus, Greece, Italy, Malta, Portugal, Spain
EUCF third Call

Call 3: 15 October 2021 – 17 December 2021

Central & East: 26 Investment Concepts
North & West: 24 Investment Concepts
South: 19 Investment Concepts

EUCF Total: 69 Investment Concepts financed
Grant: 60,000 Eur / investment concept
EUCF Journey

1. Pre-application Phase
   - Municipalities/local authorities, groupings and local public entities are informed about the EUCF through:
     - EUCF Website
     - EU Events
     - Webinars and Info sessions

2. Application Phase
   - 1. Eligibility check
   - 2. Full Application
   - Successful applications
   - Rejected applications
     - Redirected to EUCF Helpdesk for support

3. Grant Agreement Phase
   - Preparation and Signature of the Grant Agreement
   - EUCF beneficiary receives the first payment of the grant (70%)

4. Investment Concept Development
   - EUCF provides support to beneficiaries in developing their investment concepts:
     - Technical support
     - Capacity building
     - Standard tools and documents

5. Implementation of investment concept
   - Validation of the Investment Concept
   - EUCF beneficiary receives the second payment of the grant (30%)
   - Monitoring forms on implementation of the investment concept
   - Capacity building events

2 months
2 months
up to 12 months
24 months
Sectors targeted in the two Calls

Sectors targeted by the first Call
- Residential Buildings: 15%
- Public Buildings: 19%
- District Heating: 11%
- Other Sectors: 11%
- Smart Grids: 7%
- Sustainable Urban Mobility: 8%
- Innovative Energy Infrastructure: 16%

Sectors targeted by the second Call
- Residential Buildings: 34.8%
- Public Buildings: 10.1%
- Other Sectors: 2.9%
- District Heating: 5.8%
- Building Integrated Renewables: 14.5%
- Sustainable Urban Mobility: 14.5%
- Smart Grids: 4.3%
- Innovative Energy Infrastructure: 13%
Set up your own City Facility
Questions and Answers

Moderated by: Adrian Joyce

Please send your questions via the Q&A box.
Intervention by Energy Cities

Intervention by

Peter Schilken,
Energy Cities
The contribution of the French Caisse des Dépôts Climate Plan for a Green Recovery and the importance of local technical assistance for building renovation

Presentation by

Caroline François-Marsal,
Caisse des Dépôts Group
Caisse des Dépôts
Local technical assistance for building renovation in the context of the Green recovery

Why and How is Technical Assistance the Wealth-enabler for buildings?
Caroline François-Marsal, Policy officer
28/09/2021
Caisse des Dépôts (CDC) and the energy renovation of buildings in France

Historical financier of:

Social housing
• Construction, renovation (total loan outstanding 160bn€)
• Loans dedicated to thermal renovation of buildings (i.e: EcoPrêt, interest rate 0%)

Local public sector
• Municipalities, hospitals, universities…
• Thermal renovation of public buildings - Grand plan d’investissement 2018-2022 (i.e: Prêt Ambre, Intracting)

Several means of intervention
✓ Anchored in territories (Regional departments)
✓ Lender on saving funds
✓ Investor in equity
✓ Financing technical support

Engagement reinforced via CDC Climate Plan
New levies of action via CDC 2020 Climate Plan

Climate Plan
(France Relance)

September 2020
Banque des Territoires and Bpifrance (Groupe Caisse des Dépôts)

40 Bn€ for 2020-2024

Including:
• 20 Bn€ to accelerate the transition of companies and territories, and financing support solutions

Challenges of thermal renovation in France:
• Private housing: 2.2 Bn m2
• Social housing: 360M m2
• Private buildings: 600M m2
• Public building: 380M m2

= 3.5 Bn m2
145 Mteq/CO2/year
1/3 CO2 emissions in France
The French ecosystem of thermal renovation of buildings

❖ 4 building types

➢ Public housing:
   ✓ Social housing => Caisse des Dépôts / financier
   ✓ Social and affordable housing => CDC Habitat / operator

➢ Public tertiary:
   ✓ Local authorities’ estate => Caisse des Dépôts / financier
   ✓ State operators’ estate (hospitals, universities) => Caisse des Dépôts / financier
   ✓ State’s estate (administrations…)

➢ Private housing:
   ✓ “third party companies” => Caisse des Dépôts / investor

➢ Private tertiary (companies’ buildings, SMEs) => Bpifrance, Icade / financier
Financing technical support dedicated to local authorities

National level:
• Contributes to the conception, implementation, and follow-up of national policy of energy renovation of buildings in link with ministries (subsidies), ADEME (technical assistance).
• Finances via intracting ( repayable advances) and loans (GPIAmbre)

Regional/local level:
• Regional departments of Caisse des Dépôts examine financing files and support local authorities in their renovation project:

Advising
• Cofinancing pre-project studies

Financing
• Repyable advances intracting Intracting:
• Loan GPI AmbRE

Monitoring
• National platform of follow-up of energy consumption
Focus on educational estate: Plan « 1000 Ecoles Action Cœur de Ville »

Objective: Launch 1000 projects of thermal renovation by 2022

For whom?
- 233 municipalities benefitting from the national programme « Action cœur de Ville »

Which buildings?
- Kindergarten and primary schools,
- Buildings used for school needs, educational estate (canteens, conservatories, libraries, sport halls…)

How?
- Increase of TA credits – from 50% to up to 100% financing cofinancement

30% of the energy consumption of public buildings of local authorities
And 40% of the local authorities’ estate

Action Cœur de Ville
National programme launched in 2017, 5bn € including 1bn € by CDC implemented by CDC to revitalize the centers of middle-sized municipalities in France
« 1000 écoles Action Cœur de Ville » : steps of the support

1) SENSITIZE
Help understand the importance of the renovation project
*Energy comparator tool developed by CDC*

2) INFORM
Energy audit of the educational estate and identification of needs
*Pre-project study financed up to 100% by CDC*

3) DECIDE
Build estate strategy, plan investments, identify priorities
*Financed up to 100%*

4) PROGRAMME
Define operational modalities, best financial package
*Co-financed up to 80%*

5) FINANCE
Mobilization of necessary resources
*Loans: Gpi Ambre, Edu-prêt; Loan ACV*  
*Repayable advances: Intracting*

6) MONITOR
Pilot and measure of energy efficiency gains
*Platform developed by BDT*
The key role of Technical Assistance in the context of the revision of the Energy Performance of Buildings Directive (EPBD)

Presentation by

Jesse Glicker,
Buildings Performance Institute Europe (BPIE)
The key role of technical assistance in the context of the EPBD

28/09/2021 | Jesse Glicker

Why and How is Technical Assistance the Wealth-enabler for buildings?
EUROPEAN NON-PROFIT THINK-TANK

POLICY ADVICE ON BUILDING REGULATION, FROM DESIGN TO IMPLEMENTATION

BRUSSELS AND BERLIN

INDEPENDENT RESEARCH

IMPROVING THE ENERGY PERFORMANCE OF BUILDINGS ACROSS EUROPE

IN OPERATION SINCE 2010

BUILDINGS PERFORMANCE INSTITUTE EUROPE

What we do

EUROPEAN NON-PROFIT THINK-TANK

POLICY ADVICE ON BUILDING REGULATION, FROM DESIGN TO IMPLEMENTATION

BRUSSELS AND BERLIN

INDEPENDENT RESEARCH

IMPROVING THE ENERGY PERFORMANCE OF BUILDINGS ACROSS EUROPE

IN OPERATION SINCE 2010
BPIE’s MISSION is to improve the energy performance of buildings by

Actionable, data-driven analysis that contributes to ambitious buildings-related policies and programmes at EU and Member State level, and beyond;

Timely and efficiency support to governments to develop and implement transformative regulatory and legislative standards;

Cutting edge thought leadership, sharing best practice through our network in Europe and globally.
BPIE’s technical assistance involvement

- Project specific focus
  - Benchmarking for energy efficiency (topic 4) – Concept paper, October 2021
  - BuildUpon2 H2020 – Research paper, technical assistance, what is needed for local authorities, and the Renovation Wave
- Concept paper/brief on European TA, TBD
Recommendations for the EPBD review

- Funding and guidance to establish one-stop-shops, building renovation passports and support programmes
- Establish a TA framework to clarify the options and process for accessing TA
- Clarify the current available TA options and eligibility requirements
- Available [here](#)
### Overview of initiatives and measures referencing TA – What is needed to deliver?

<table>
<thead>
<tr>
<th>Initiative/Measure</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Green Deal</strong></td>
</tr>
<tr>
<td>Strategic communication</td>
</tr>
<tr>
<td><strong>Renovation Wave</strong></td>
</tr>
<tr>
<td>Strategic communication</td>
</tr>
<tr>
<td><strong>Multiannual Financial Framework</strong></td>
</tr>
<tr>
<td>Budget</td>
</tr>
<tr>
<td><strong>Recovery and Resilience Facility</strong></td>
</tr>
<tr>
<td>Budget (extension to the MFF)</td>
</tr>
<tr>
<td><strong>NextGenerationEU</strong></td>
</tr>
<tr>
<td>Temporary recovery instrument (budget)</td>
</tr>
<tr>
<td><strong>InvestEU</strong></td>
</tr>
<tr>
<td>Funding support</td>
</tr>
</tbody>
</table>
Recommendations from our work

At the European Level

- **Issue guidance on aligning all required national plans**, including leading practices for integrating TA solutions.
- **Provide resources to national and local governments** on different investment programmes, requirements of these programs.
- Ensure that all relevant resources (websites and helplines) be **made available in all languages** where projects are eligible.
- **Create directory of programmes available**, eligibility requirements, timelines, contact information, making clear WHO these programmes are for, etc.

At the Member State level

- **Training** including information on how MS and local authorities can **access funding and TA programmes**
- **Scale up marketing and dissemination efforts** to fully tap into the market of energy efficient renovations. National and local **one-stop-shops** are an ideal way to administer and direct TA to home and buildings owners.
- **Engage different project participants** who may need TA such as financial institutions, homeowner’s associations, utility companies, or designers and contractors
- **Create a national or local liaison** to remain in contact with the EC.
What are the key questions we need to ask?

• How do we triple renovation rates in Europe?
• Who is responsible for addressing the key issues surrounding TA, including clarification?
• What is the way forward?
Questions and Answers

Moderated by: Adrian Joyce

Please send your questions via the Q&A box.
Conclusions and Wrap-Up