

Dear reader,

In times of negative interest rates for bonds and savings, the question about the economic viability of long-term investments in energy infrastructure is getting even more important. A [new BPIE report](#) analyses the vulnerability of the building stock in South-East Europe in the case of gas-supply disruptions, and recommends solutions which have a positive payback and follow the “Efficiency First” principle, rather than risking stranded assets in expanding the gas supply infrastructure. A recent [BPIE survey](#) reveals the different perceptions of governments compared to industry and civil society stakeholders when it comes to progress in renovating European buildings. In 12 Member States, we asked about progress in implementing the national renovation strategy and in preparing the next edition due in April 2017. The results may surprise you, or maybe not? And finally, this newsletter updates you on recent developments with [nearly Zero-Energy Buildings](#), the value of [Energy Performance Certificates](#), the [Heat Roadmap Europe progress](#) and the many other developments this autumn brings.

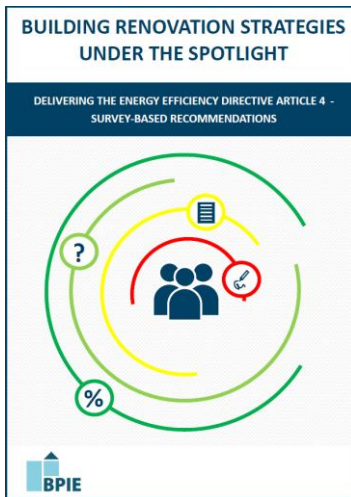
Oliver Rapf, BPIE’s Executive Director

HIGHLIGHTS



Safeguarding energy security in South-East Europe with demand-side infrastructure

The security of gas supply is a political issue of considerable importance to the economies and well-being of citizens, especially in the South-East Europe countries. To better understand the risks faced by consumers in the event of a gas-supply interruption, this [study](#) explores vulnerability of the building sector to these disruptions in specific SEE countries, through the prism of a newly-developed Building stock Vulnerability Indicator. The [analysis](#) finds that Hungary and Slovakia face a severe risk, Bulgaria a substantial risk and four other countries have a moderate risk exposure. Reducing gas demand through a dedicated building renovation programme could considerably improve energy security and drastically reduce the need for investments in the supply infrastructure. BPIE estimated the potential impacts by modelling four scenarios and concludes with recommendations.



Stakeholders' views on the progress with implementing renovation strategies and preparing for the next submission (Art. 4, EED)

The objective of the national building renovation strategies, as required by Article 4 of the Energy Efficiency Directive (EED), is to establish long-term confidence in the market, spur investments and increase the renovation rate in the EU. Based on 69 qualitative interviews with actors from different sectors, this [survey](#) concludes that Member States make only limited progress in renovating their building stock. Highlighting the sharp divergence of opinion between governmental and non-governmental actors, the [report](#) gives a series of recommendations to solve this mismatch. A blog post on the topic is available on the [Build Upon](#) website.

FOCUS ON



ZEBRA2020 - NEARLY ZERO-ENERGY BUILDING STRATEGY 2020
Deliverable D3.1
The Impact of Energy Performance Certificates on property values and nearly Zero-Energy Buildings
Report for policy makers



The impact of Energy Performance Certificates on property values

Does energy efficiency have an impact on the European housing market, in terms of price surplus for sale and rental transactions? This is a key topic ZEBRA2020 partners, including BPIE, questioned in this [report](#). This analysis was carried out to estimate the willingness-to-pay for energy efficiency in 12 EU Member States. In addition to the market analysis, a survey among real estate agents was carried out for 8 countries. The aim of the survey was to collect real estate agents' opinion on the main factors which households consider when selecting properties to buy or rent.



ZEBRA 2020 - NEARLY ZERO-ENERGY BUILDING STRATEGY 2020
Deliverable D5.2: Market actors' NZEB uptake - Drivers and barriers in European countries



Increasing the number of nearly Zero-Energy Buildings (nZEB): drivers and barriers in EU countries

Although most EU countries have recently revised existing rules, regulations and guidelines, this [study](#) finds that there is still a way to go to agree on official national nZEB levels and set up a supporting framework to increase the nZEB market share, in accordance with the Energy Performance of Buildings Directive (EPBD). There is a strong call from the building industry for increased knowledge on new

technology along with a need for economic incentives, putting in place pilot projects, and making best use of subsequent benefits.



The Energy Strategy of Romania: making the case for energy efficiency in buildings

Improving the energy efficiency of the national building stock must be a key priority in the Energy Strategy for Romania, currently under revision for the period 2016-2030 with a view to 2050. BPiE has been supporting the Romanian authorities in fulfilling EU requirements linked to buildings' energy performance for over 5 years and is making use of this milestone to [report on reasons why Romania should include measures to improve the energy efficiency of residential buildings](#).

NEWS



[Newsletter] Heat Roadmap Europe: the first newsletter is available

[Heat Roadmap Europe](#) was launched in April 2016, with BPiE as a partner, to design a low-carbon heating and cooling strategy for Europe. The [project newsletter](#) presents the work already carried out as well as the ongoing activities. The first results are expected to be published before the end of the year, including a detailed profile for the heating and cooling sector, as well as the first version of Peta4, mapping the heating and cooling demand.



Active House Label Contest: participate until October 1

Active House is a vision of buildings that create healthier and more comfortable lives for their occupants without negative impact on the climate. The Active House Alliance contest will reward the project standing out for its characteristics of sustainability and vision towards the future with a free Active House label. The [contest](#) will present projects at the forefront of innovation, regulation and standards and future proof. The deadline to participate is October 1.

EVENTS

[Workshop] Boosting the market for energy efficiency in buildings – Insights and recommendations, September 30, Bucharest

This event will be a forum to share experiences on monitoring tools which can evaluate the market uptake of nearly Zero-Energy Buildings (nZEBs). The debates will cover a wide scope of topics relevant for Romania such as recognising private and European funding streams, setting up an open and reliable EPC database, using ESCOs and supporting the development of a nZEB market strategy. These aspects will be discussed in the context of the current development of the Romanian Energy Strategy and in view of the upcoming revision of the EPDB. [More information and registration.](#)

[Webinar] October 13, Intelligent Buildings Europe - Advancing Sustainability & Intelligent Automation

As a result of recent legislation, including the EPBD and rising interest from utilities in Energy Services Company (ESCO) business models, the intelligent building and automation space is seeing a new lease of life. What is the role of intelligent buildings in the energy market? What about financing and funding models to accelerate adoption? This [webinar](#) will give a taste of what to expect from *Intelligent Buildings Europe* at European Utility Week 2016, where BPIE will speak in two sessions, *Regulations and the promising role of buildings in transforming the energy market* and *Energy management for intelligent buildings*, in Barcelona in November 2016.

[Event] Sustainable Real Estate Investment - Implementing the Paris Climate Agreement: An action Framework, September 14, Munich

There is considerable evidence showing that climate change, energy security and resource scarcity pose clear investment risks and create significant opportunities for real estate investments. Yet, despite the compelling case for action, the levels of current investments are well below the optimum economic and societal rates. The Finance Initiative of UNEP released a [report on sustainable real estate investment](#) as a step-by-step guide to help investors and asset managers increasing the energy performance of their real estate portfolio. The report will be launched in a 2-hour morning event in Germany on September 14, providing a framework on how to effectively and easily integrate ESG and climate risks and opportunities into investment strategies. The event will be held in German, [few seats are still freely available.](#)

Where to meet us

- [26th Economic Forum in Poland](#), September 16, in Krynica Zdrój
- "Improvement of energy efficiency in construction industry as a generator of economic development" under GIZ Energy Efficiency Consultancy in BiH and the Bosnia Energy Efficiency Project (BEEP), September 21, in Republika Srpska
- [SBE16 Istanbul](#) will take place from October 13 to 15, with more than 100 presentations around the topic 'Smart metropolises, integrated solutions for sustainable and smart buildings and cities'.
- [The European Federation of Building Societies XVIII European Congress](#), October 19-21, Budapest
- [EnPC-INTRANS](#), Capacity Building on Energy Performance Contracting in European Markets in Transition, November 15 in Stuttgart
- [4th Passivhaus Portugal Conference 2016](#), November 25, in Aveiro, Portugal



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