



EAE AWARDS 2023/2024 CEREMONY

22 May 2024 in Brussels/Belgium

COMPLIANCE ADVICE & RECORDINGS

(1) Please respect anti-trust and compliance rules during the entirety of this event!

- This includes the meeting sessions as well as the conversations during the breaks.
- Please intervene immediately if you feel violation of rules.

(2) Pictures and video recordings of the event

- As mentioned during the registration for this event, pictures and video recordings will be taken during the event. They might later be published for communication purposes and might show single participants.

By attending this event participants accept the above-mentioned conditions.

AGENDA

Session 1: Efficiency first – why buildings play a crucial role

13:00-15:15

Welcome of participants

Jacek W. Kulig, EAE President, Poland

Raf De Haes, President of xthermo.be, Façade Insulating System Association, Belgium

Latest trends in the European ETICS market

Ralf Pasker, EAE Managing Director

European Energy Efficiency Guide 2024: A true Renovation Wave for a Sustainable Future

Kerstin Lohr, Forschungsinstitut für Wärmeschutz München (FIW Munich), Germany

EPBD.wise: Bringing European Building Policy to Life

Rose Hartwig-Peillon, Policy & Events Officer, EuroACE - Energy Efficient Buildings & Renovate Europe

Bringing Technical Expertise and Private Financing Together – Collaboration is key.

Raffael Rackwitz, DEN – Deutsches Energieberater Netzwerk e. V., Germany

15:15-15:45

Coffee break

AGENDA

Session 2: ETICS & architecture – Putting the EPBD into practice

15:45-18:00

Energy Performance of Buildings – the new Legislative Framework

Stefan Moser, Head of Unit, European Commission, DG Energy, unit B.3: Buildings and Products

From architects' perspective: Collaboration is key!

Ruth Schagemann, President of Architects Council of Europe

EAE Awards 2023/2024 - Awarding Ceremony

Moderation by:

- Niko Wauters, architect, winner of the EAE Awards 2021, Belgium
- Adrian Joyce, Secretary General of EuroACE – Energy Efficient Buildings & Campaign Director of the Renovate Europe Campaign, Ireland

Summary of the day

Prof. Zuzana Sternova, EAE Vice President, Slovak Republic

Get together

18:00-19:00

Cocktail reception

At the hotel bar

SPECIAL THANKS



For co-organising

- a. **Xthermo.be** – EAE’s Belgian national member association
- b. **Renovate Europe** – EAE is campaign supporter

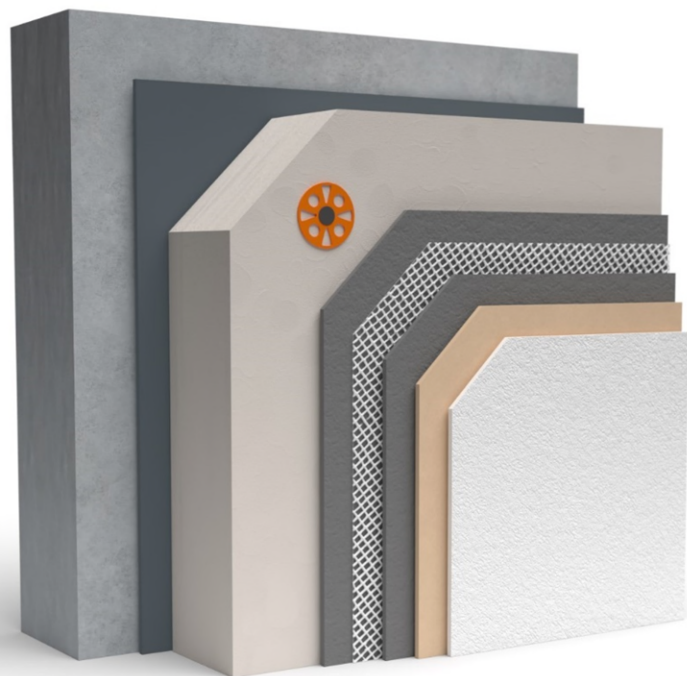


For sponsoring

- a. **eumeps** – European EPS association & EAE member
- b. **fischer** – Manufacturer of fixing solutions & EAE member



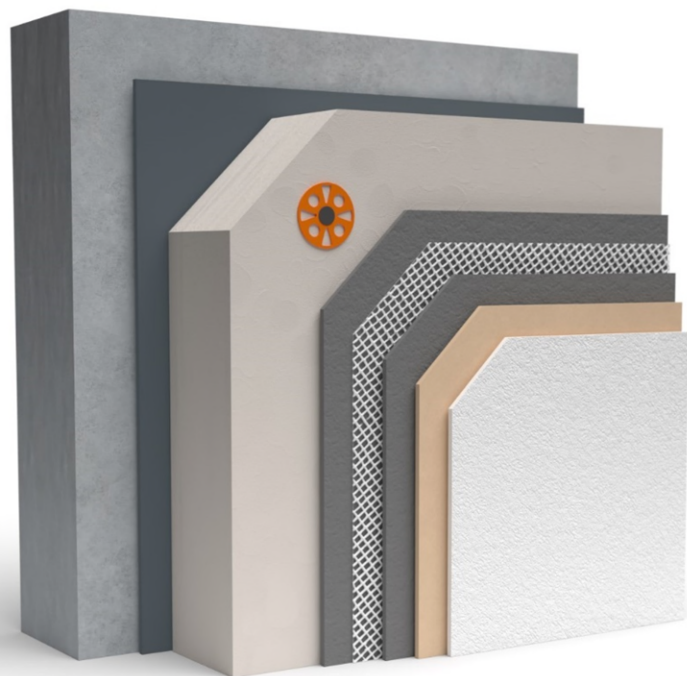
WELCOME OF PARTICIPANTS



Jacek W. Kulig

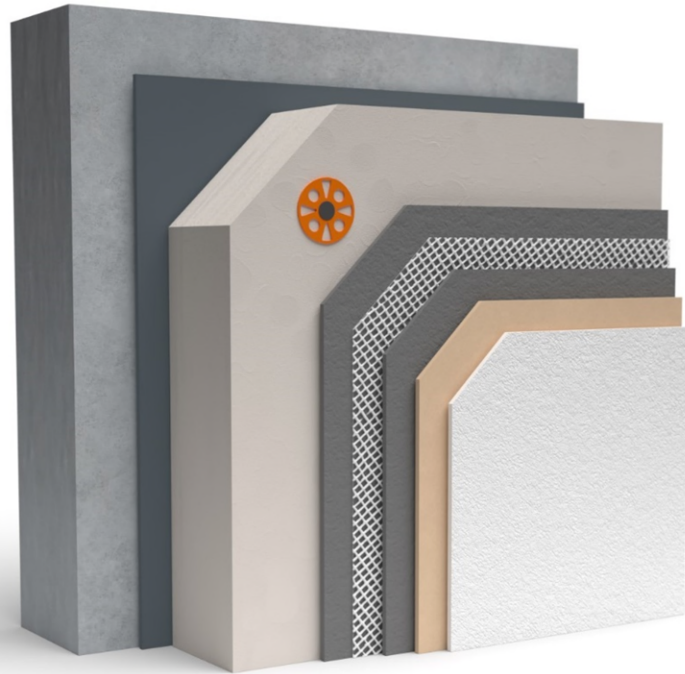
EAE President

WELCOME OF PARTICIPANTS



Raf De Haes

Xthermo President



Latest trends in the European ETICS market

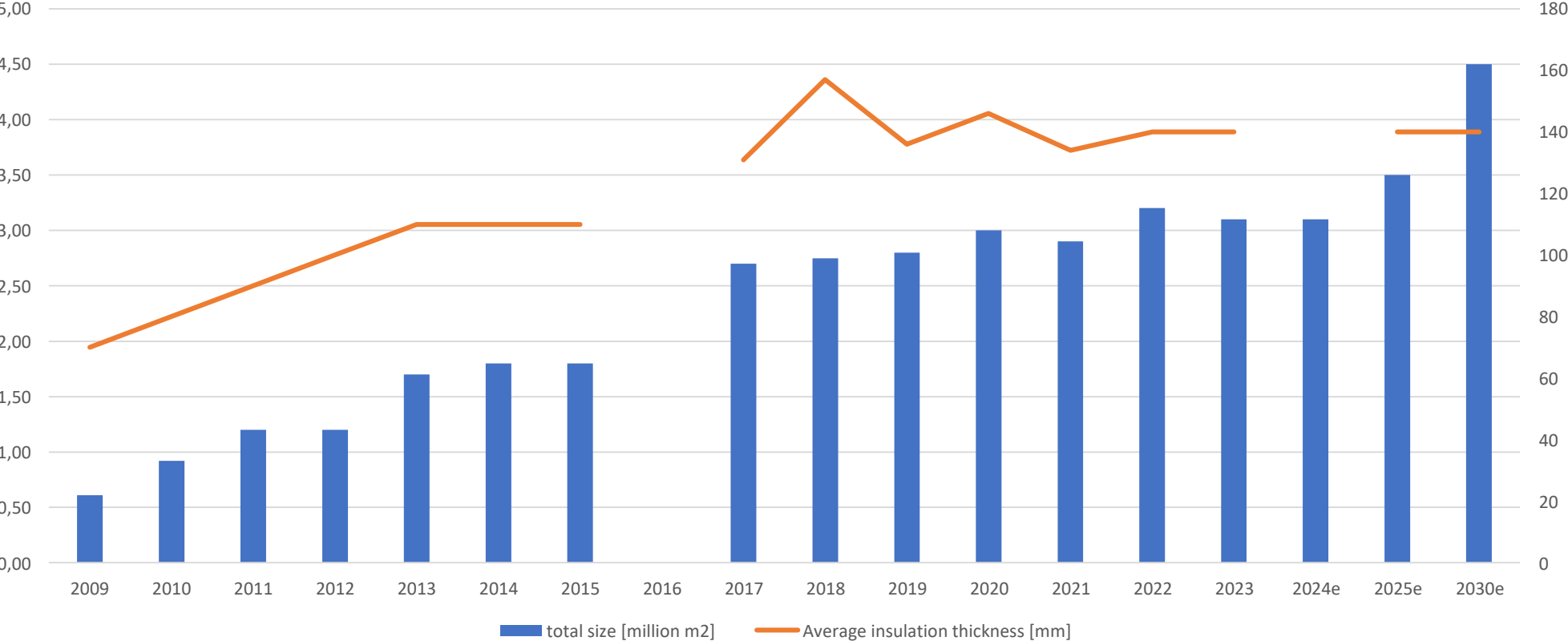
Ralf Pasker, EAE Managing Director

EUROPEAN ETICS MARKET



Belgium

Belgium 2009 - 2030e

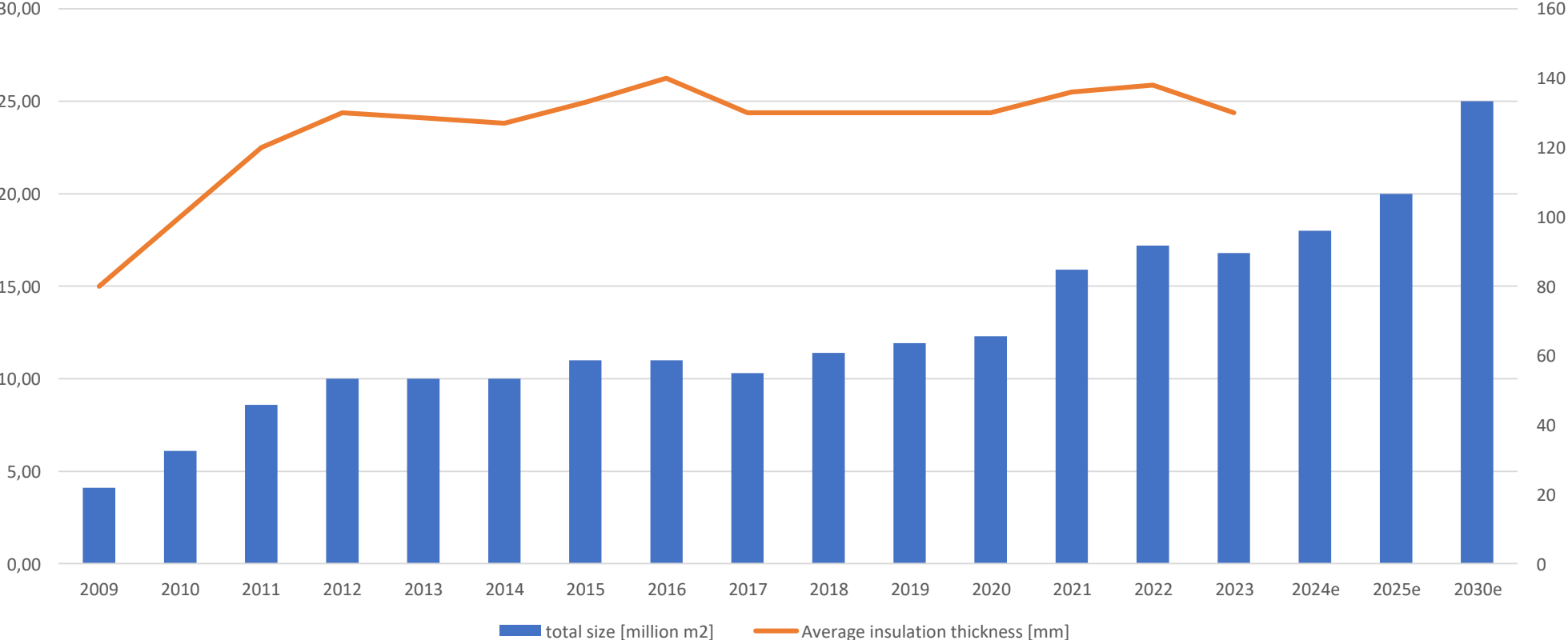


EUROPEAN ETICS MARKET



France

Market development 2009 - 2030e

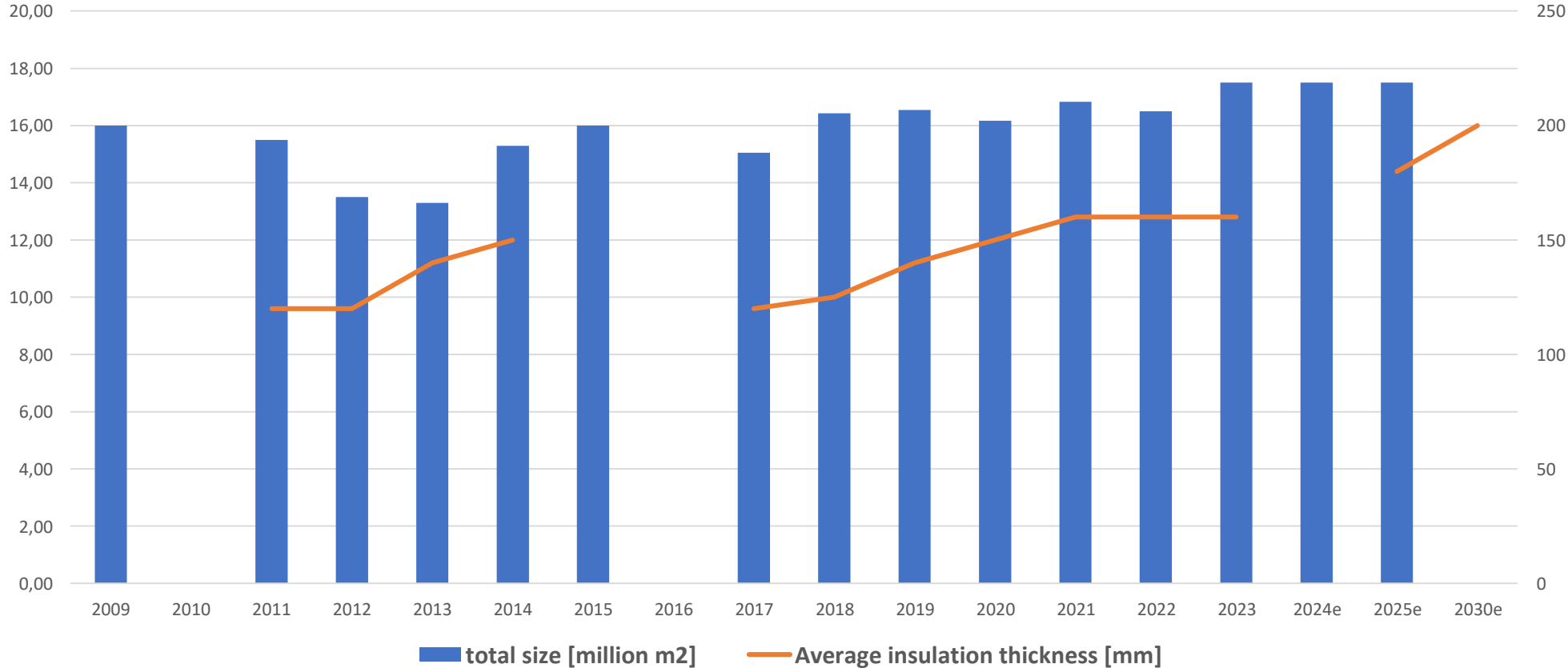


EUROPEAN ETICS MARKET



Czech Republic

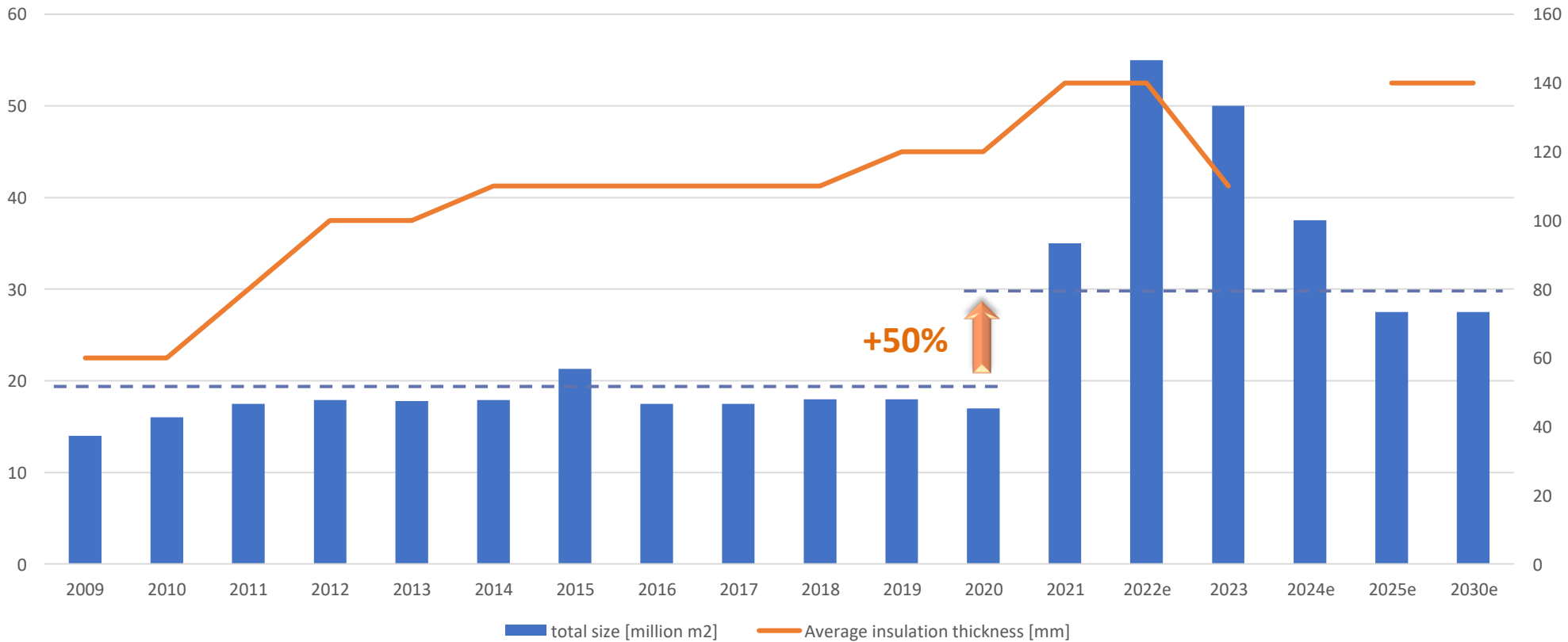
Czech Republic 2009 - 2030e



EUROPEAN ETICS MARKET

Italy

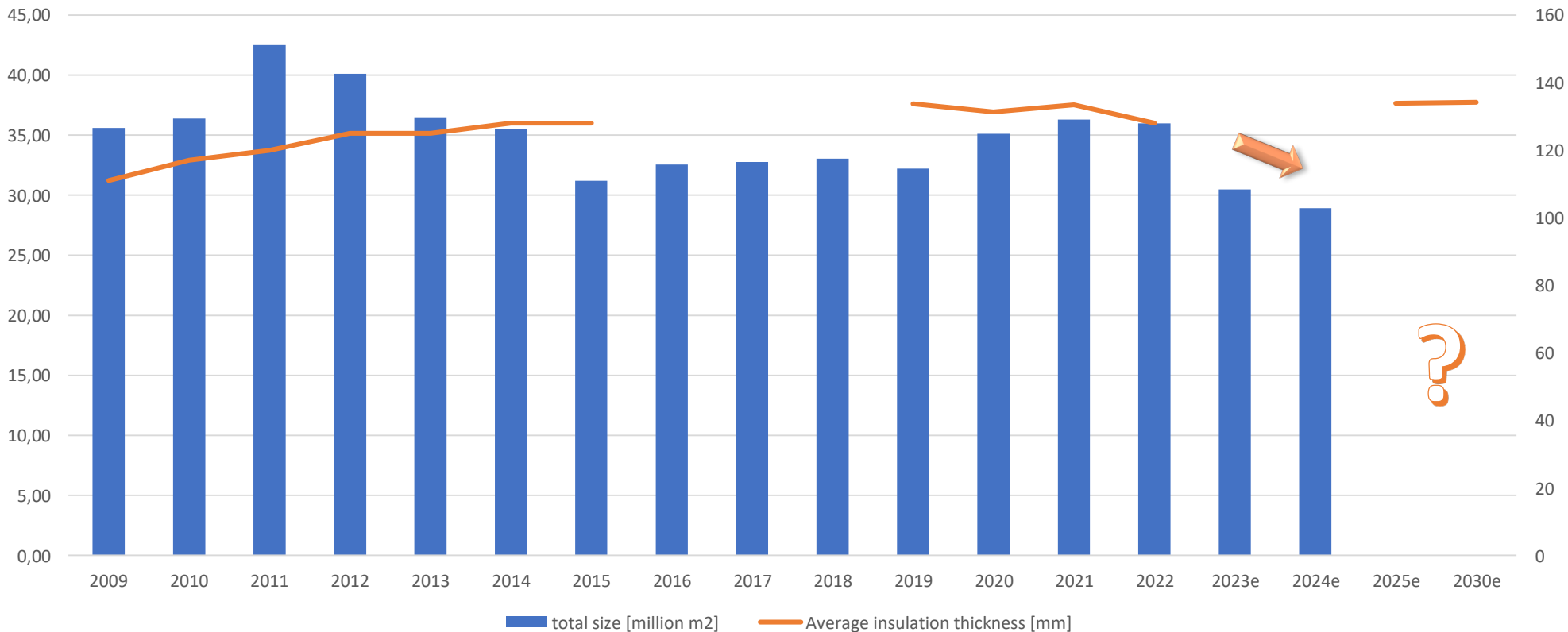
Market development 2009 - 2030e



EUROPEAN ETICS MARKET

Germany

ETICS market development 2009 - 2030e

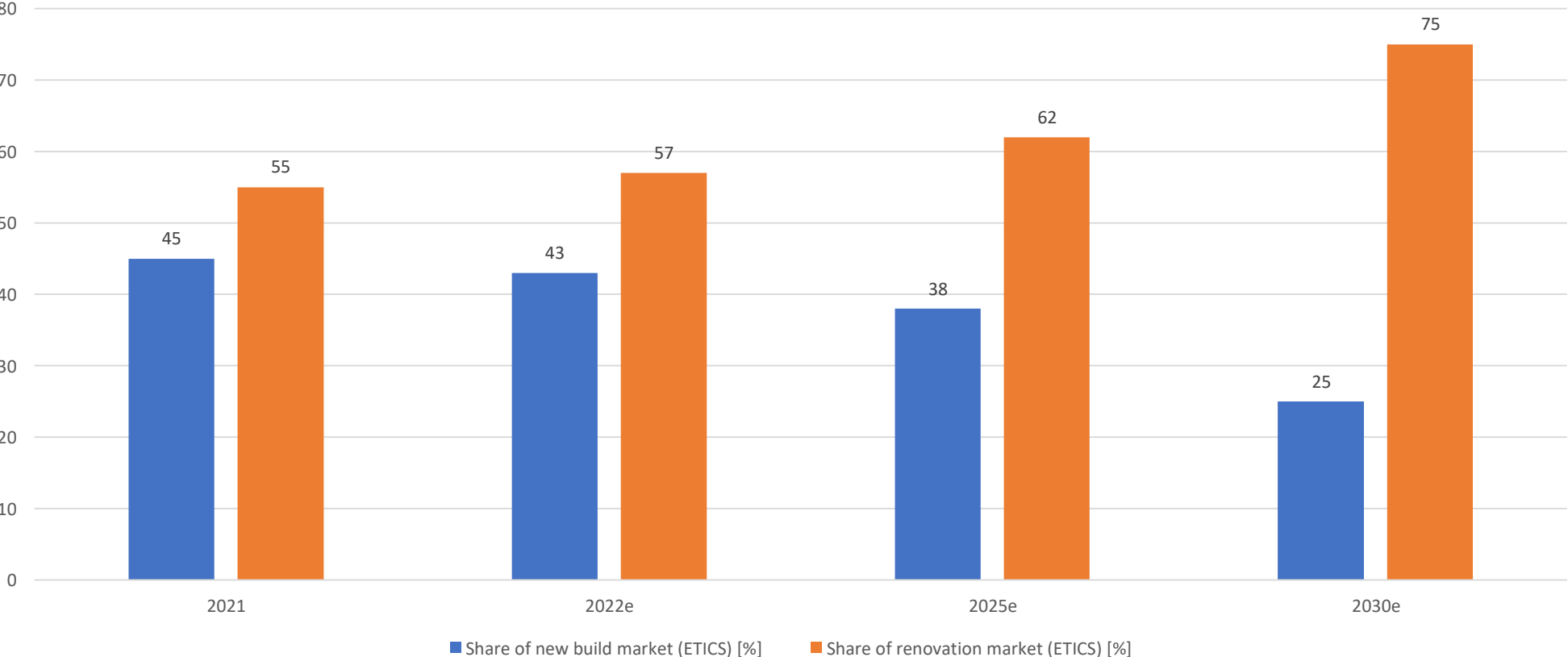


EUROPEAN ETICS MARKET



Belgium

Belgium: ETICS market by sector

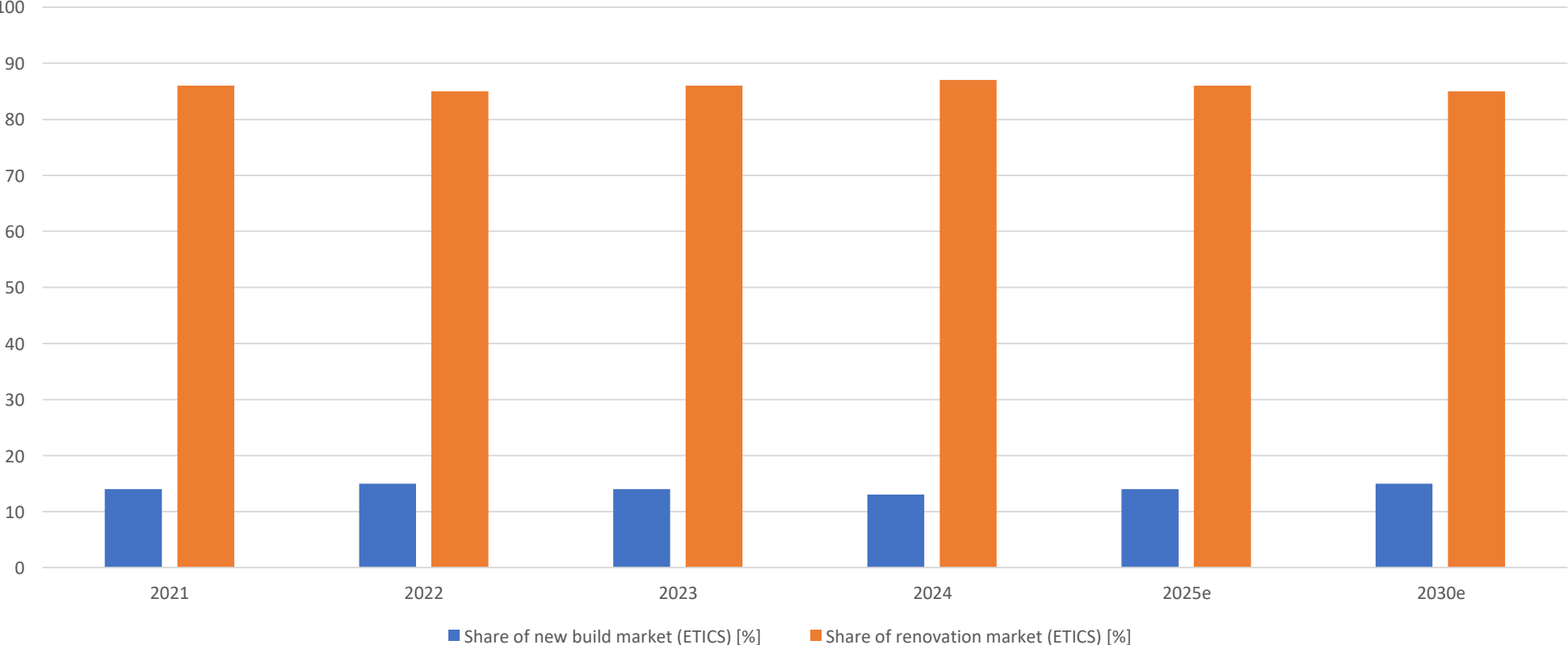


EUROPEAN ETICS MARKET



Italy

ETICS market by sector



General observations

■ Lack of skilled workforce

- In nearly all member states are concerns are obvious that in view of the lack of skilled staff (design, architecture, installation) the urgently needed increase in building renovation cannot be achieved.
- Increasing interest in prefabricated solutions.

■ Insulation

- In ETICS EPS and MW insulation are the main insulation materials used.
- Other materials gain interest (especially plant based), but their share remains low.
- Stagnation of average insulation thicknesses; however, the thermal resistance of traditional insulation materials has increased.

■ Supply chain

- Huge problems with material supplies lowered significantly
- Delivery problems and price situation has normalised

Circular economy

- **ETICS sector takes its responsibility**
 - Minimising production waste: often cut-offs directly redirected in production process
 - Construction waste: cut-offs of insulation material collected and reused/recycled
 - Optimisation of packaging: reduced volumes, bio-based or recycled materials, bio-degradable materials
 - Electrification of logistics
 - Demolition waste: deconstruction, separation, reuse/recycling
- **Market demand**
 - Becomes increasingly important
 - Increasing market demand: manufacturers are requested to deliver solutions and documentation

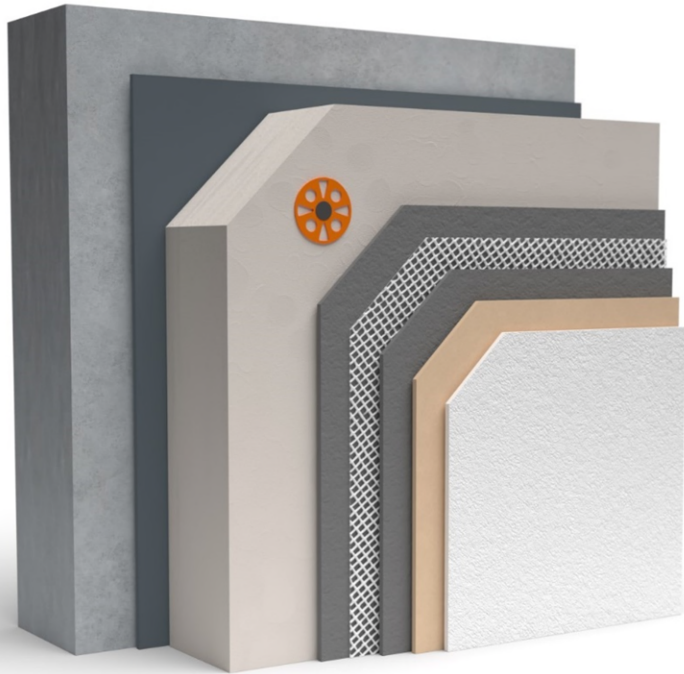
General observations

- **Stop-and-go policy-making/funding is poison for Renovation Wave**
 - Countries with relatively stable framework conditions show stable development or even constant increase.
 - Too generous funding boosts but overheats the market with negative impact on quality.
 - Superbonus 110% was great stimulus that brought renovation of building envelopes and energy efficiency improvements in the spotlight – positive long-term impact.
 - Discussions in German policy-making (energy efficiency decree) and disruptions in funding left investors with huge uncertainties and crashed the market.
 - Generally, there is a larger share of renovation activities expected in coming years as new built is decreasing and conservation of existing construction is preferred (carbon footprint already there).
- **Entire construction value chain requires reliable framework conditions**
 - Lead time of several years to scale-up production, workforce, trainings
 - Uncertainties lead to postponement of urgently needed investments at all levels

EUROPEAN ETICS MARKET

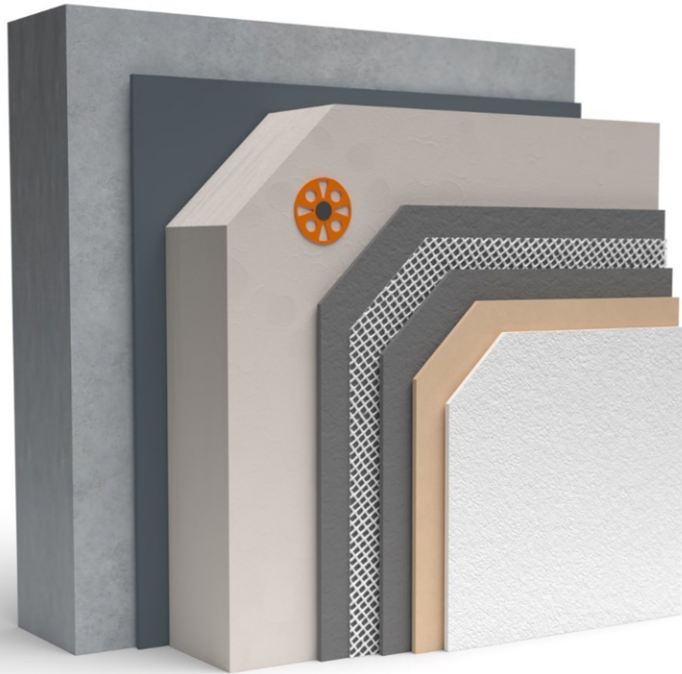
Conclusions

- **The European ETICS sector stands ready to deliver on the Green Deal.**
- **We ask political decision-makers to continue with the road to net carbon neutrality.**
- **One-stop-shops lower the barrier for private investors to take action.**
- **Public authorities must play their leading role as foreseen in the Energy Efficiency Directive: 3% annual renovation rate.**
- **Continuity is key!**
- **We remain available for consultations and open dialogues.**
- **Positive story-telling is needed to take people on board.**



European Energy Efficiency Guide 2024: A true Renovation Wave for a Sustainable Future

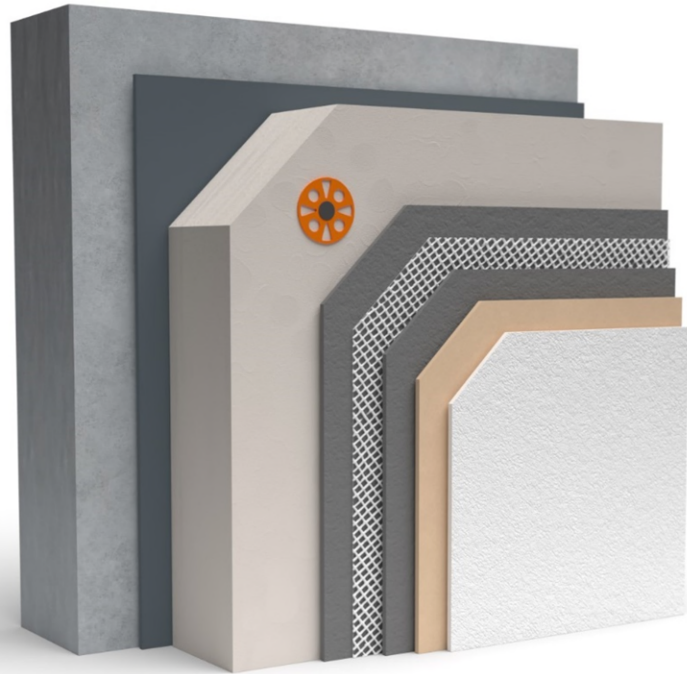
Kerstin Lohr, FIW München



EPBD.wise: Bringing European Building Policy to Life

Kerstin Lohr, FIW München

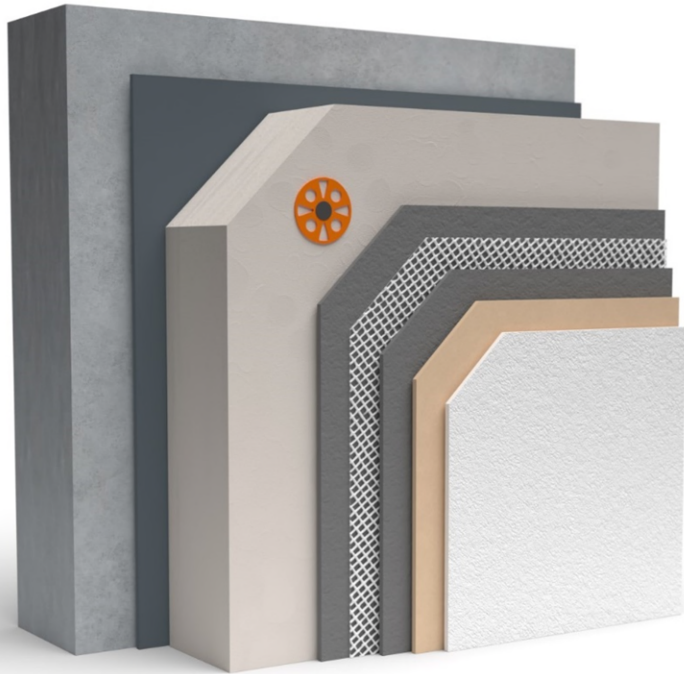
ONE-STOP-SHOPPING



**Bringing Technical
Expertise and Private
Financing Together –
Collaboration is key**

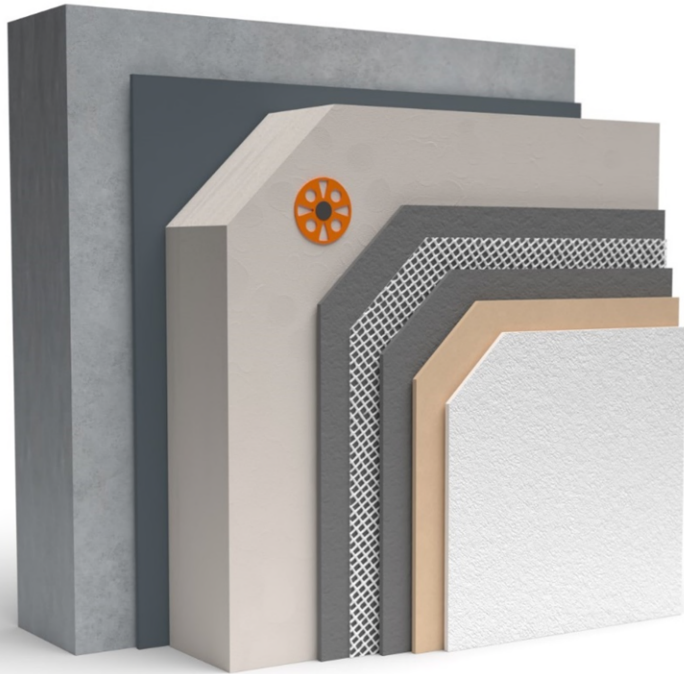
Raffael Rackwitz, DEN

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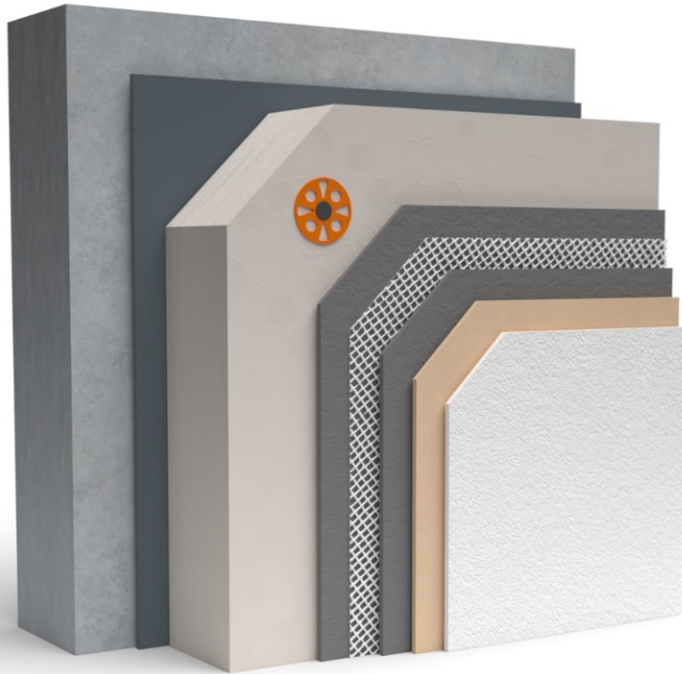
Raffael Rackwitz, DEN



Energy Performance of Buildings – the new Legislative Framework

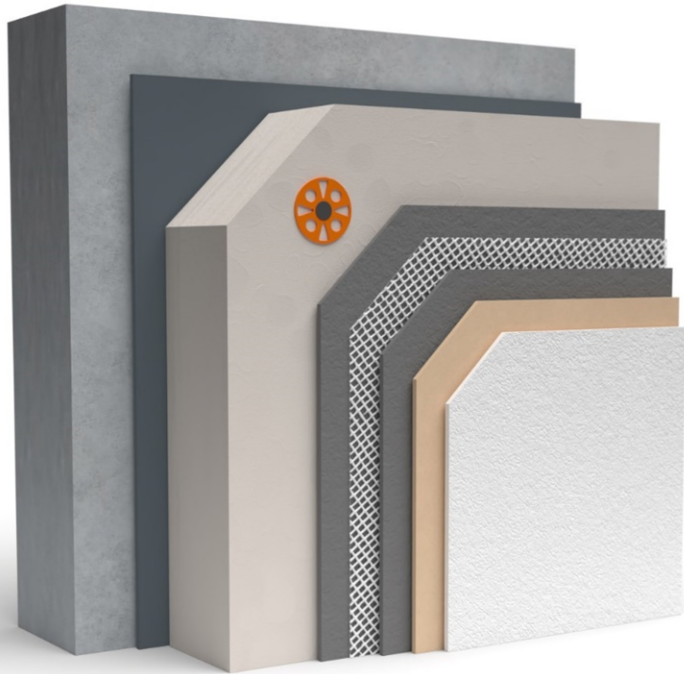
Stefan Moser, European Commission, DG
Energy

ARCHITECTS



From architects
perspective:
Collaboration is key!

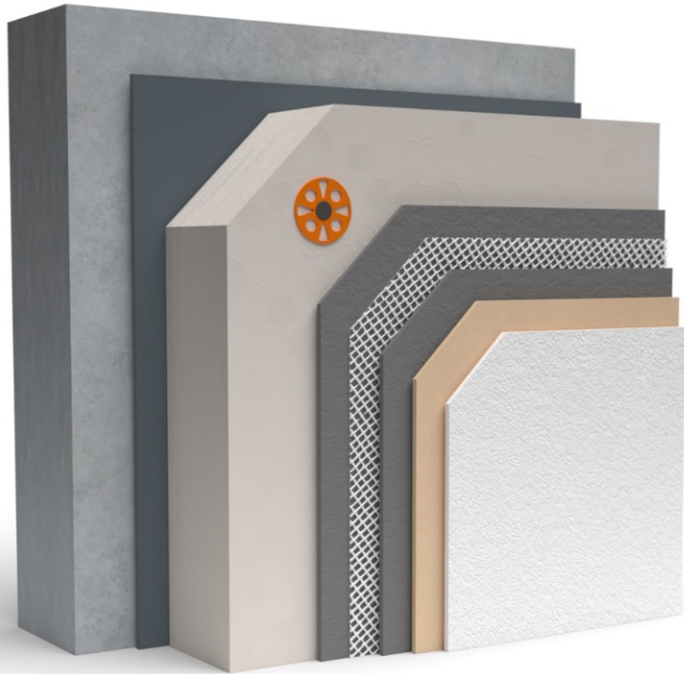
Ruth Schagemann, President of Architects
Council of Europe



EAE Awards 2023/2024 - Awarding Ceremony

Niko Wouters, architect
Adrian Joyce, EuroACE

SUMMARY



Summary of the Day

Niko Wouters, architect
Adrian Joyce, EuroACE