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Version of item: Presented version

Housing Quality Network

Making the most of 'Green' deals : other strategic funds for 'housing retrofit'

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Content of presentation :

- thoughts on strategic routes to finance
- Homes & Communities and other 'housing' funds
- using EU funds
- using procurement partnerships
- funding a framework for 'retrofit' skills development
- building longer-term LEP capacities



Key issues :

- What other funds can help cover future retrofit costs besides tarif-based revenues?
- How can the 'green economy' best help retrofit works in the medium to long-term ?
- How can retrofit work secure the potential to repeat the intended carbon reductions?

Setting a strategic context (cf. 'Matrix'):


- **Baseline** : Partnership / Governance / Leadership
: Evidence and Monitoring Base
- **Resources** : Finances & Investment
: Planning/Development/Regulat. Control
: Skills & knowledge
- **Activities** : Industry & Business Development
: Procurement
: Social Factors

Retrofit 'Maturity Matrix' (1)

Theme 5 E's	Partnership, Governance & Leadership <i>Enable</i>	Evidence & Monitoring base <i>Evidence</i>	Finance & Investment <i>Enable</i>	Planning, Development & Regulatory Control <i>Encourage/Enforce</i>	Skills & Knowledge <i>Enable/Educate</i>	Industry & Business Development <i>Enable/Educate</i>	Procurement <i>Encourage/Enforce</i>	Cultural & Social Factors <i>Encourage</i>
Theme Description	<i>The extent to which a partnership approach to retrofit is in place and the capacity and leadership strength of</i>	<i>The use made of a robust evidence base and / or management measurement approaches to monitor progress of building stock improvement measures</i>	<i>The availability of financial and investment resources to deliver</i>	<i>Activity which is focused on using planning, development & regulatory control powers to deliver retrofit outcomes</i>	<i>The development of an adequate supply of people with the right skills and knowledge to deliver retrofit outcomes whether in the existing workforce or as new entrants</i>	<i>The degree to which activity is aiding the growth of existing businesses or the creation of new businesses that are focused upon carbon reduction achievements</i>	<i>The use of existing and new public and private sector procurement to deliver retrofit outcomes – buying power.</i>	<i>The degree to which social and cultural factors are addressed through the partnership's activity</i>
Maturity Level								
Unaware and lacking knowledge, plan or activity Level 1								
Aware and gathering knowledge no delivery plan Level 2								
Have knowledge and a time-bound plan to progress Level 3								
Implementing plan and making good measurable progress Level 4								
Acknowledged as leader in this theme/aspect Level 5								

Retrofit 'Maturity Matrix' (2)

- **Level 1**
Unaware and lacking knowledge, plan or activity
- **Level 2**
Aware and gathering knowledge no delivery plan
- **Level 3**
Have knowledge and a time-bound plan to progress
- **Level 4**
Implementing plan and making good measurable progress
- **Level 5**
Acknowledged as leader in this theme/aspect

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- = A strategic context for raising finances
 - = Bids for available funds + other revenue
 - = Maximising partnerships and procurements

Homes & Communities and other 'housing' funds:

- 'Empty Homes' as option for new affordable supply
- Flexibilities for renovation / retrofit standards
- 10-unit pilot acquisitions in Meden Valley
- Partnerships to explore with 2011-15 grant bidders
- Consider Decent Homes+ contracts (£2.1bn)
- Consider Las' post-HRA self-financing business plans

Using EU funds :

- Focus upon energy efficiency / renewable regeneration / demand reduction / 'environment' / **and** water quality & supplies
- Primary focus upon market capacities & development
- Papers & case studies, Radion conference May 2011

<http://www.radian.co.uk/retrofit/>

- Perspective on EU funds for retrofit (NHF & CECODHAS) – note use of ERDF around the regions

- **Intelligent Energy Europe:** : “the period 2011–2013 should support and facilitate this transition ... existing building stock into nearly zero energy buildings” (*also REQUEST /TRAINREBUILD* energy performance contracts)
- **EU FP7 Energy Programme:** Research into energy efficiency & energy savings schemes (*list in Key Info*)
- Forthcoming call July 2011 **under FP7:** “Energy Efficient Buildings, Public Private Partnership PPP energy saving technologies for...envelope retrofitting’
- **European Local Energy Assistance (ELENA)** : support for sustainable energy supply at local levels

Using procurement partnerships :

- Challenge to 'costs' by procurement groups (& SPVs) and pooling of resources
- Efficiency East Midlands proposed 'retrofit model'
 - Fund installation of PVs
 - 25-year FiT income
 - Match-fund (ECO / EU / etc.) to create equity
 - Use equity to attract long-term loans
 - Create long-term revolving loan

Funding a framework for 'retrofit' skills development:

- Baseline assessments

Design of 'retrofit' intervention(s)

Selection of materials & processes

Technological application / installation

Monitoring of impact(s)

Partnership & Project Management

- UK sources: Local Investment Plans; Construction Skills *grant*; Growth Investment/Innovation Fund *Prospectus*
- EU sources: Intelligent Energy Europe (IEE)

Building LEP capacities to champion retrofit :

- Coalition policy for the 'green economy'[Oct 2010]:
 - low carbon, green innovation
 - green infrastructure
 - stimulation of supply chains
 - green 'Low Carbon Clusters'
- Only in 23% of LAs current local econ. devel. plans
- Need for LEPs to adopt strategic role & promote bids
- Greater Manchester Low Carbon Economic Area

Concluding remarks (1)

- The role for retrofit 'strategies' and self-assessments
- Accessing funds via key partnerships
- Developing market capacities to deliver VFM
- Demonstrating the carbon savings achieved....

Concluding remarks (2)

- Good strategies support winning bids
- Winning bids require strong partnerships
- Strong partners can shape market capacities
- Market capacities will shape the carbon saved

- **Sources of EU information:**

<http://www.bis.gov.uk/news/topstories/2011/Mar/growth-and-innovation-fund>

http://ec.europa.eu/research/energy/eu/news/pdf/20-07-2010/calls-2011_en.pdf#view=fit&pagemode=none

http://ec.europa.eu/research/industrial_technologies/fp7-information-day-for-ppp-2011_en.html

General EU Funding Guide:

<http://www.welcomeurope.com/default.asp?id=53&gp=y&gclid=CMuTqou7makCFVJX4QodHgpptg>

National Refurbishment Centre (supporting the practical delivery of green refurbishment and retrofit) :

<http://www.rethinkingrefurbishment.com/>