

National Retrofit Plan

Quarterly Progress Report
Quarter 2, 2023



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Sustainable Energy Authority of Ireland

SEAI is Ireland's national energy authority investing in, and delivering, appropriate, effective, and sustainable solutions to help Ireland's transition to a clean energy future. We work with the public, businesses, communities, and the Government to achieve this, through expertise, funding, educational programmes, policy advice, research, and the development of new technologies.

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1. Introduction

SEAI is designated as the National Retrofit Delivery Body. In this role, the SEAI will function as the lead agency in driving the delivery of our retrofit targets. The responsibilities of the SEAI in this capacity include:

- Driving delivery of our retrofit targets.
- Promoting retrofit uptake through marketing campaigns.
- Enhancing the appeal of the retrofit supports and improving the customer journey.
- Setting standards for and developing and registering One Stop Shops.
- Increasing the number of BER assessors.
- Monitoring and managing the quantum and quality of retrofit service provision.
- Supporting the supply chain in the area of retrofit.

Report Overview

This quarterly report details progress by SEAI on delivery against targets in the Government's National residential Retrofit Plan as well as the Government's Climate Action Plan (CAP). The format of the report is to provide an overview of delivery against key metrics of numbers of property upgrades, B2 BER ratings achieved, and heat pumps installed.

Schemes covered in this report include:

- **Individual Energy Upgrade Grants** through the Better Energy Homes and Solar PV schemes
- **One Stop Shop Service under the National Home Energy Upgrade Scheme** and homes completed under earlier proof of concept pilot schemes.
- **Fully Funded Energy Upgrades** through Better Energy Warmer Homes Scheme and the Warmth and Wellbeing Scheme
- **Community Energy Grants**

[More detailed descriptions of these schemes are included in the Appendices to this report.]

The report should be read in conjunction with the final quarterly report for the preceding year which includes details of prior achievements against annual targets. See [2022 Full Year Report](#) here.

Full datasets and analysis for all schemes from 2015 onwards are available to view [here](#).

SEAI continuously reviews and refines the reporting methodology and definition of key metrics to improve the accuracy and quality of insights. In some instances, this may result in minor adjustments to previously reported figures. Where appropriate, these will be highlighted as additional notes in the main body of the report.

2. Review of Quarter 2, 2023

Headline Outcomes for Quarter 2, 2023

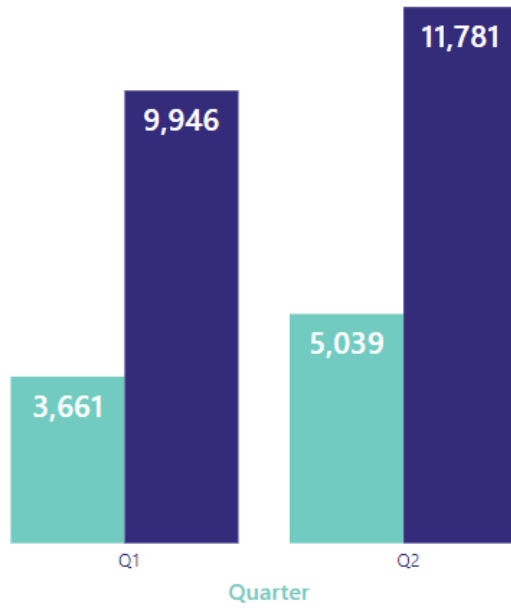
- SEAI processed more than 31,500 grant applications across all schemes to end Q2, up 41% on the same period in 2022.
- 21,727 property upgrades were completed to end Q2, up 150% on the same period in 2022.
- 7,566 homes were upgraded to a BER B2 or higher to end Q2, up 210% on the same period in 2022.
- 2,346 property upgrades were completed through programmes focussed on households at risk of energy poverty to end Q2, up 20% on the same period in 2022.
- 7,122 attic and 5,641 cavity wall measures supported.
- Expenditure across all schemes in the first half of 2023 was €129.9m, an increase of 121% on the same period last year.
- On the supply side, the additional registration of five one stop shops this quarter points to continued strong interest in the longer-term economic opportunities offered. We anticipate the increased supply to further drive demand and competitiveness.

Major market or economic factors in this quarter

- Demand remained strong across all programmes in Quarter 2. While applications to some schemes are down slightly on the previous quarter, in all cases applications are higher than the same period last year. This slight reduction is not wholly unexpected as there tends to be a seasonal dynamic to the home energy upgrading.
- The removal of VAT on solar panels has driven significant demand on this programme and it is likely to continue into the third and fourth quarters of 2023.
- While the higher level of inflation and fuel price increases experienced in 2022 have eased, cost of living and affordability issues are anticipated to be an ongoing concern amongst some homeowners. This could have an impact on their ability and willingness to undertake a retrofit on their homes at this time.
- On the supply side, the additional registration of five one stop shops this quarter points to continued strong interest in the longer-term economic opportunities offered. We anticipate the increased supply to further drive demand and competitiveness.

2023 Property Upgrades (to end Q2)

● 2022 Property Upgrades ● 2023 Property Upgrades



21,727

2023 Property Upgrades (to end Q2)

8,700

2022 Property Upgrades (to end Q2)

+150%

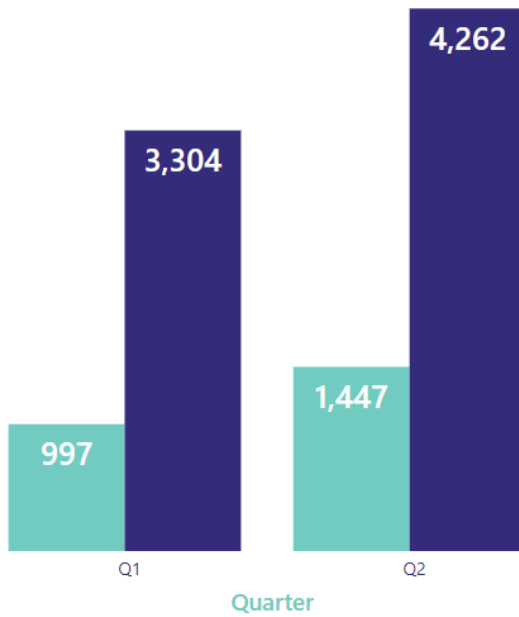
Year on Year Change

37,181

2023 Property Upgrade Target

2023 B2s Achieved (to end Q2)

● 2022 B2s achieved ● 2023 B2s achieved



7,566

2023 B2s achieved (to end Q2)

2,444

2022 B2s achieved (to end Q2)

+210%

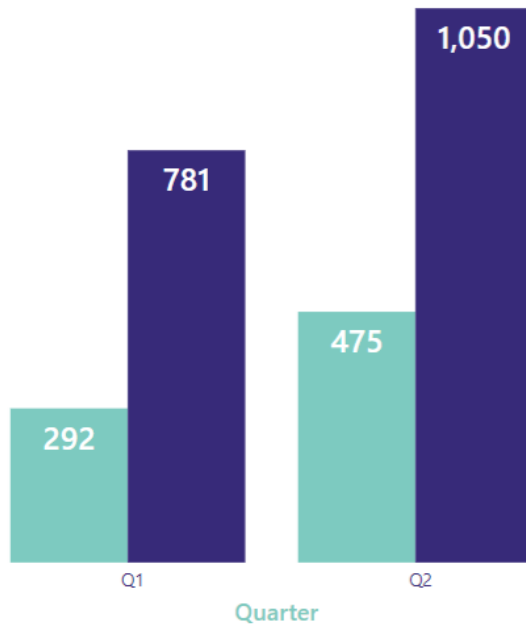
Year on Year Change

13,846

2023 B2s or Better Target

2023 Heat Pumps Installed (to end Q2)

● 2022 Heat Pumps ● 2023 Heat Pumps



1,831

2023 Heat Pumps (to end Q2)

767

2022 Heat Pumps (to end Q2)

+139%

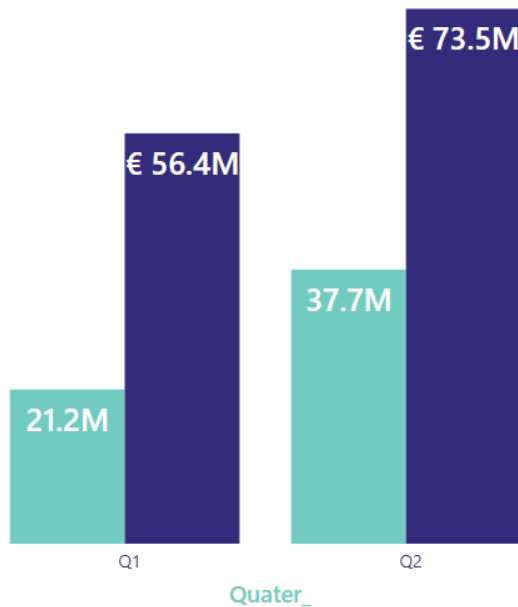
Year on Year Change

5,734

2023 Heat Pumps Target

Total Capital Expenditure (to end Q2)

● 2022 Capital Expenditure (to end Q2) ● 2023 Capital Expenditure (to end Q2)



€ 129.9M

2023 Capital Expenditure (to end Q2)

58.9M

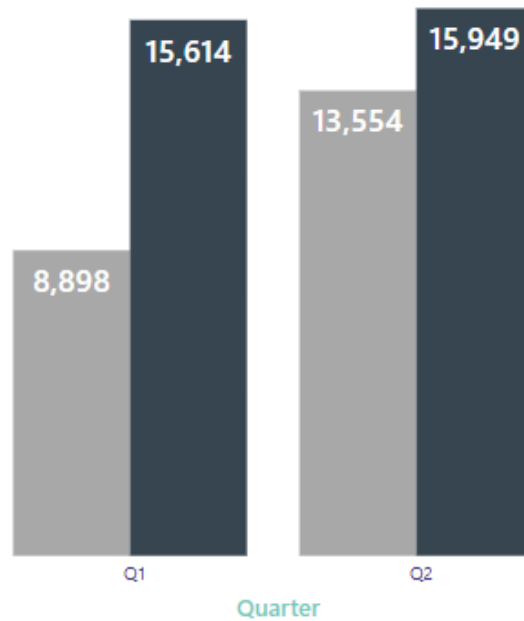
2022 Capital Expenditure (to end Q2)

+121%

Year on Year Change

2023 Applications Received (to end Q2)

● 2022 Applications ● 2023 Applications



31,563

2023 Applications (to end Q2)

22,452

2022 Applications (to end Q2)

+41%

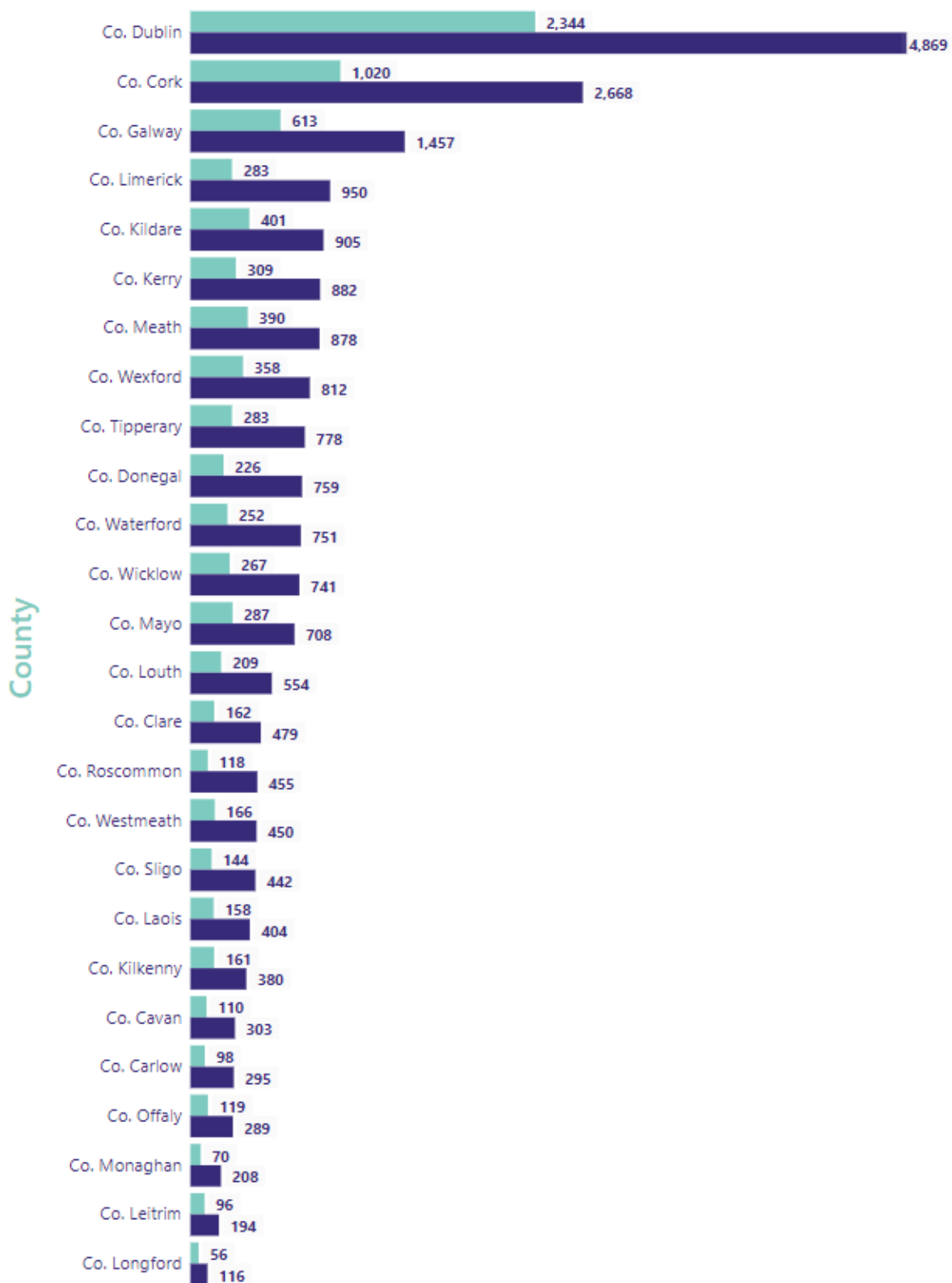
Year on Year Change

Note on revised methodology.

Starting with this report, for the One Stop Shop service, SEAI will now use the date an offer was issued rather than the date the application was created, as it is a more reliable metric to estimate the potential pipeline of works. In a small number of cases applications are withdrawn or changed ahead of a firm offer. Application numbers previously reported across all schemes for Q1, 2023 have thus been revised from 15,641 to 15,614 to reflect this change.

Number of Property upgrades by county (to end Q2)

● 2022 Property Upgrades ● 2023 Property Upgrades



Note: Appendix 1 to this report contains a table with county volumes by scheme.

3. Programme Reviews

3.1 One Stop Shop Service (National Home Energy Upgrade Scheme)

Key insights

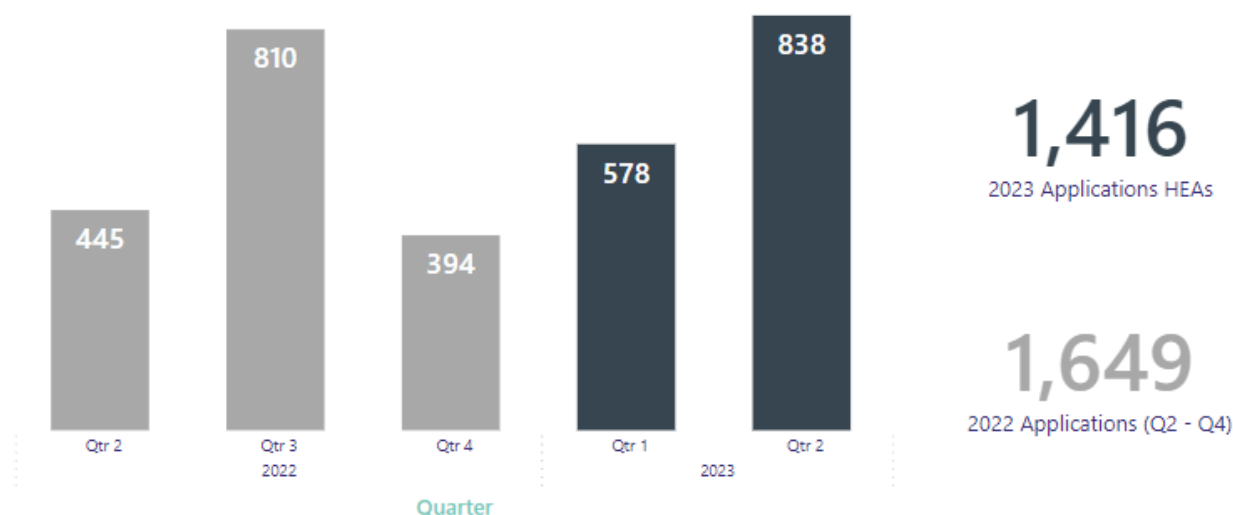
- There are 17 registered One Stop Shop service providers, an increase of five through quarter 2.
- One Stop Shops continue to report strong homeowner interest.
- SEAI has started a pilot project to explore the scope for applying less stringent heat loss requirements for homes to qualify for a heat pump grant. The first monitoring systems are being installed in homes.

Demand pipeline

- Community Based Social Marketing is an approach to intensive marketing of the grant schemes in a small geographic area – comprising advertising, PR, community engagement and an all-day event with supply chain actors. The first two such activities have been conducted in Tullamore and Portlaoise. This approach will support building partnerships between One Stop Shops and energy communities for localised lead generation.
- The number of Home Energy Assessments (HEA), the detailed technical assessment of a home's energy performance, is continuing to build and this is creating the pipeline of home energy upgrades into 2024. It is noteworthy that HEAs are not mandatory and many Approved Housing Bodies complete a HEA for a representative sample of homes.
- SEAI are working on refinements to the HEA, making it more portable between one stop shop service providers should a homeowner wish to do so.

HEA Applications Received

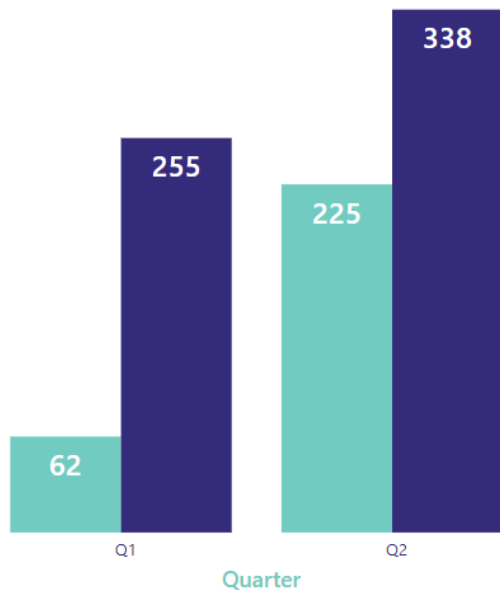
● 2022 Applications ● 2023 Applications



Starting with this report, SEAI will now use the date an offer was issued rather than the date the application was created, as it is a more reliable metric to estimate the potential pipeline of works. In a small number of cases applications are withdrawn or changed ahead of a firm offer. Application numbers previously reported for One Stop Shops HEAs for 2022 have thus been revised from 1,653 to 1,649 to reflect this change.

2023 Property Upgrades (to end Q2) - One Stop Shop Service

● 2022 Property Upgrades ● 2023 Property Upgrades



593

2023 Property Upgrades (to end Q2)

363 | 230
AHB* | Private

287

2022 Property Upgrades (to end Q2)

172 | 115
AHB* | Private

+107%

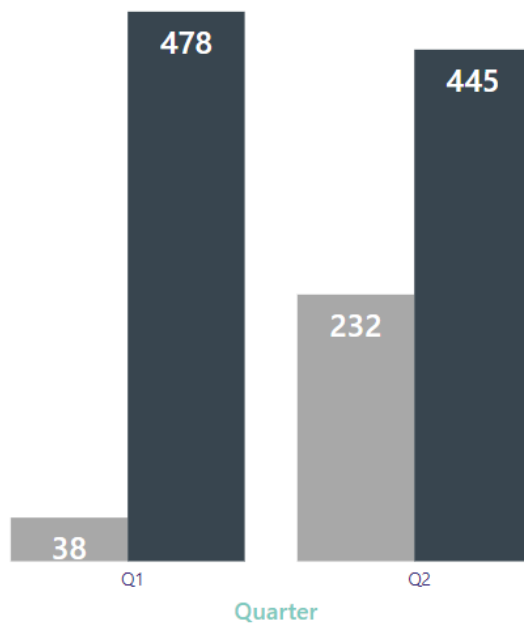
Year on Year Change

*AHB = Approved Housing Body Home

Note: Completions in Q1 of 2022 relate only to remaining homes completed under the two One Stop Shop precursor pilot schemes, whereas those in 2023 relate to homes completed under the full One Stop Shop scheme as launched in February 2022.

2023 Works Applications Received (to end Q2) - One Stop Shop Service

● 2022 Applications ● 2023 Applications



923

2023 Applications (to end Q2)

270

2022 Applications (to end Q2)

Note: Applications in Q1 of 2022 relate only to applications under one of the two pilot schemes, whereas those in 2023 relate solely to applications under the full One Stop Shop scheme as launched in February 2022. Also, starting with this

report, SEAI will now use the date an offer was issued rather than the date the application was created, as it is a more reliable metric to estimate the potential pipeline of works. Application numbers previously reported for One Stop Shops for Q1, 2023 have thus been revised from 505 to 478 to reflect this change.

3.1.1 One Stop Shop works cost and BER analysis

SEAI has completed analysis of the average cost of works, average grant received and average BER uplift for all private homes completed through the One Stop Shop scheme, since commencement to end Q2 2023. The data is presented in the two tables below, one for private homes and one for homes belonging to Approved Housing Bodies.

Private Homes

Dwelling Type	No. of Upgrades	Avg. Works Cost	Avg. Grant	Avg. Cost to Homeowner	Avg. Pre BER	Avg. Post BER
Apartment	2	€46,951	€14,100	€32,851	F	A3
Mid Terrace	28	€48,771	€18,832	€29,939	E1	A3
Semi-Detached /End Terrace	92	€58,776	€21,563	€37,213	E1	A2
Detached	187	€64,143	€24,086	€40,057	E1	A2
	309	€61,041	€22,794	€38,247	E1	A2

Homes belonging to Approved Housing Bodies

Dwelling Type	No. of Upgrades	Avg. Works Cost	Avg. Grant	Avg. Cost to Homeowner	Avg. Pre BER	Avg. Post BER
Apartment	170	€26,142	€10,925	€15,217	D1	B1
Mid Terrace	146	€27,018	€15,813	€11,205	C2	A3
Semi-Detached /End Terrace	308	€28,051	€17,640	€10,398	C3	B1
Detached	4	€35,830	€20,375	€15,455	D1	A3
	628	€27,343	€15,415	€11,925	C3	B1

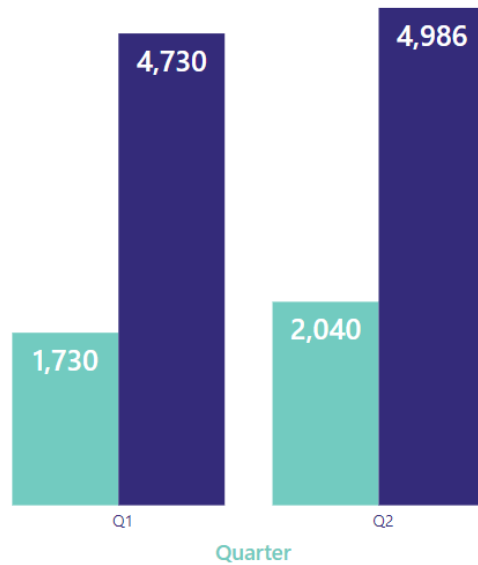
3.2 Individual Energy Upgrade Grants (Better Energy Homes and Solar PV)

Key insights

- Home energy upgrades in these particular schemes are up considerably on the same period last year.
- Applications for solar PV are up considerably on the previous quarter and on the same quarter last year, most likely significantly attributable to the removal of VAT.
- Applications on Better Energy Homes have seen a marginal reduction. The recent promotional campaign burst should help build the pipelines again.

2023 Property Upgrades (to end Q2) - Better Energy Homes

● 2022 Property Upgrades ● 2023 Property Upgrades



9,716

2023 Property Upgrades (to end Q2)

3,770

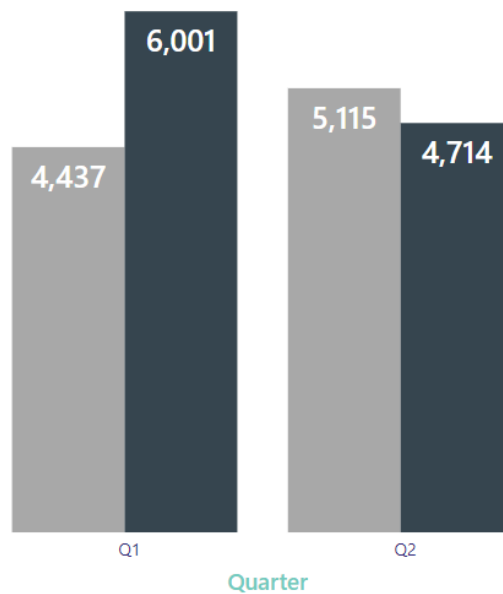
2022 Property Upgrades (to end Q2)

+158%

Year on Year Change

2023 Applications Received (to end Q2) - Better Energy Homes

● 2022 Applications ● 2023 Applications



10,715

2023 Applications (to end Q2)

9,552

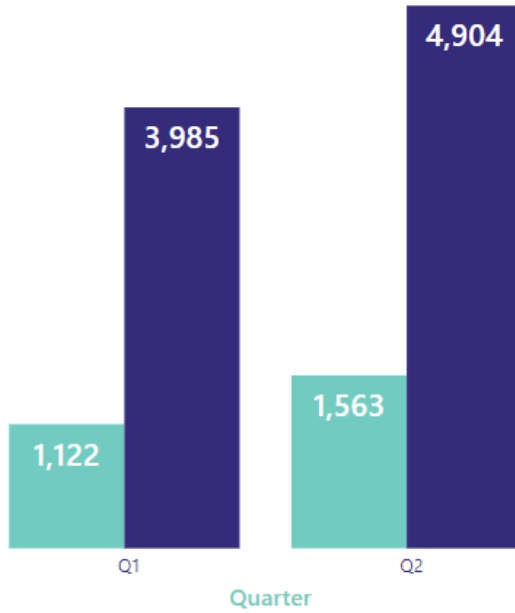
2022 Applications (to end Q2)

+12%

Year on Year Change

2023 Property Upgrades (to end Q2) - Solar PV

● 2022 Property Upgrades ● 2023 Property Upgrades



8,889

2023 Property Upgrades (to end Q2)

2,685

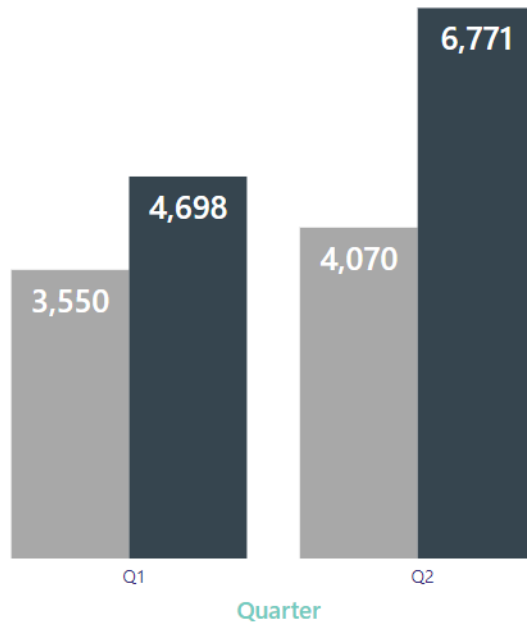
2022 Property Upgrades (to end Q2)

+231%

Year on Year Change

2023 Applications Received (to end Q2) - Solar PV

● 2022 Applications ● 2023 Applications



11,469

2023 Applications (to end Q2)

7,620

2022 Applications (to end Q2)

+51%

Year on Year Change

3.2.1 Individual measures cost analysis

The tables below provide an overview cost analysis of the average cost of works and the average grant paid for homes upgraded through the individual measures schemes.

Better Energy Homes

Year	Average No. of measures*	Average Cost of Upgrade Works**	Average Grant Paid
Q1 2023	1.4	€ 6,755	€ 2,906
Q2 2023	1.4	€ 6,742	€ 2,904

Solar PV

Year	Average Cost of Upgrade Works**	Average Grant Paid
Q1 2023	€ 11,967	€ 2,336
Q2 2023	€ 12,133	€ 2,343

*The average number of measures EXCLUDES the mandatory Building Energy Rating in order to reflect the level of upgrade per home more transparently.

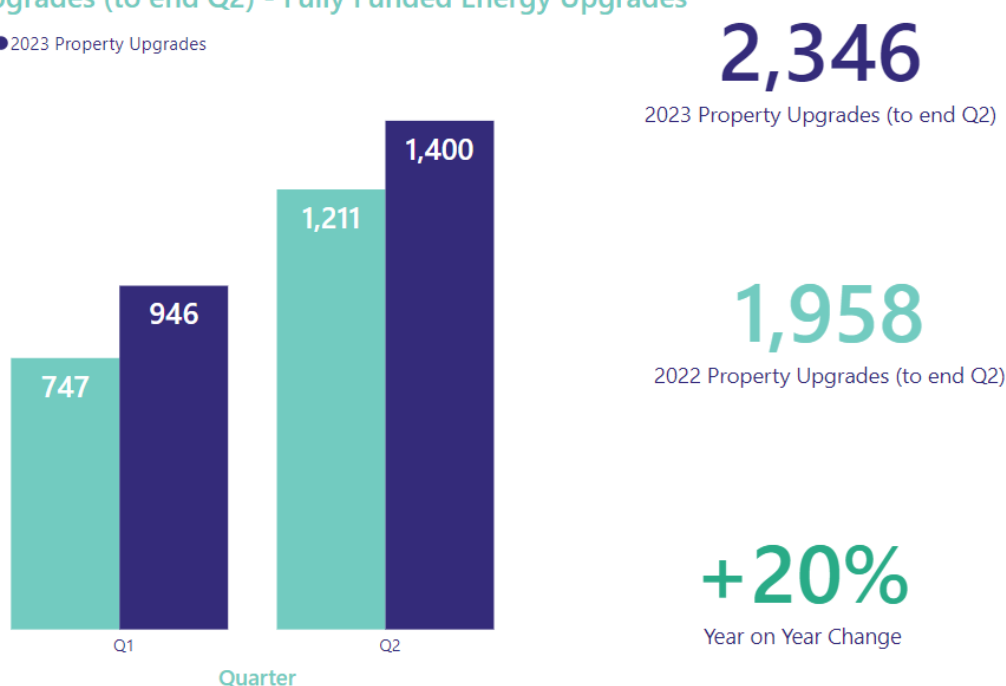
**This is the cost of works as declared by the homeowner and may, in certain instances, include costs outside of the subject home energy upgrades. To reflect more accurate averages, obvious cost outliers have been excluded from this analysis.

3.3 Fully Funded Energy Upgrades (Warmer Homes and Warmth and Wellbeing Schemes)**Key insights**

- Output continues to build with homes completions up 20% when compared to same period in 2022.
- Applications continue to be very high.
- The average cost of works for homes upgraded and fully paid in Quarter 2 was €24,250.
- Average waiting time, for upgrades completed in Quarter 2 was just under 19 months. This is measured as the time from application to the time of completing the upgrade works.

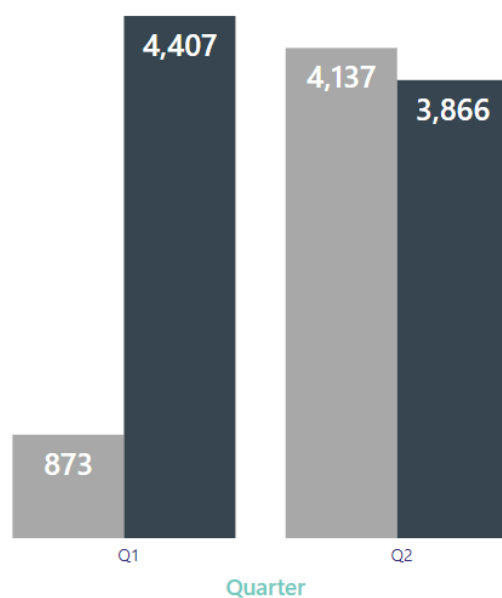
2023 Property Upgrades (to end Q2) - Fully Funded Energy Upgrades

● 2022 Property Upgrades ● 2023 Property Upgrades



2023 Applications Received (to end Q2) Fully Funded Energy Upgrades

● 2022 Applications ● 2023 Applications



8,273

2023 Applications (to end Q2)

5,010

2022 Applications (to end Q2)

+65%

Year on Year Change

3.4 Community Energy Grants

Key insights

- Twelve new applications, for multi-property projects, were received. There has been a marked increase in the rate of applications and there is continued interest from various sources.
- Community Energy Grants run differently to the other primary schemes in that large scale projects, comprised of residential and non-residential properties, are aggregated, and upgraded by a small number of specialist project coordinators.

Key Statistics	2023
Total home upgrades completed (Of which, were households at risk of energy poverty)	183 (26)
Non-residential upgrades completed	112

Appendix 1: 2023 Scheme volumes by county, to end Quarter 2

	Community Energy Grants		Fully Funded Energy Upgrades		Individual Energy Grants		One Stop Shop Service	
	2022*	2023	2022	2023	2022	2023	2022	2023
Co.Carlow			18	40	79	254	1	1
Co.Cavan			38	41	71	224	1	38
Co.Clare		3	20	27	137	442	5	7
Co.Cork		65	160	271	800	2,313	60	19
Co.Donegal		16	91	113	134	575	1	55
Co.Dublin		17	742	711	1,514	3,982	88	159
Co.Galway		7	57	109	552	1,326	4	15
Co.Kerry		5	70	65	234	805	5	7
Co.Kildare			52	108	327	777	22	20
Co.Kilkenny		1	20	23	137	355	4	1
Co.Laois			6	41	152	300		63
Co.Leitrim			33	20	61	174	2	
Co.Limerick		44	64	56	216	836	3	14
Co.Longford			25	18	31	96		2
Co.Louth		4	41	64	152	482	16	4
Co.Mayo		1	65	70	210	636	12	1
Co.Meath			85	110	299	763	6	5
Co.Monaghan			22	35	47	160	1	13
Co.Offaly			37	37	81	249	1	3
Co.Roscommon		2	29	59	88	363	1	31
Co.Sligo		1	23	23	99	415	22	3
Co.Tipperary		5	38	65	226	634	19	74
Co.Waterford		11	62	49	180	680	10	11
Co.Westmeath		1	62	54	103	395	1	
Co.Wexford			55	68	303	705		39
Co.Wicklow			43	69	222	664	2	8
Total		183	1,958	2,346	6,455	18,605	287	593

*County breakdown for homes completed through the community energy grants in 2022 were all reported in the final quarter of that year, hence the empty column.

Appendix 2: Home Energy Upgrade Scheme Overviews

SEAI offers a comprehensive range of Government funded financial supports, suiting a variety of circumstances, to help homeowners achieve their home energy upgrade ambitions.

- **Individual Energy Upgrade Grants** (comprising Better Energy Homes and Solar PV): Homeowners or private landlords apply for the grants, select energy upgrade measures, select their preferred SEAI registered contractor, manage the project, and pay for the full costs of works and claim the grant afterwards. The measures supported include attic and wall insulation, heating system upgrades and renewable energy technologies.
- **One Stop Shop Service:** A fully project managed service that provides grant support to private homeowners, private landlords and Approved Housing Bodies that want to upgrade their homes to a BER B2 or better. The service is delivered by registered One Stop Shops that assess the home, provide advice to the homeowner on suitable options, apply for the grant, complete the works and then claim the grant from SEAI. The value of the grant is discounted upfront from the cost to the homeowner. [Note: The report includes homes completed under earlier proof of concept pilot schemes which informed the national roll-out of the One Stop Shop Scheme]
- **Fully Funded Energy Upgrade** (comprising Better Energy Warmer Homes Scheme and the Warmth and Wellbeing Scheme): A fully managed solution for qualifying homeowners in receipt of certain Department of Social Protection payments to upgrade their home with measures identified from a home energy survey. SEAI manage the whole upgrade process from home survey, through contractor works, and follow up BER.
- **Community Energy Grants:** The Communities Energy Grant supports the upgrading of a wide variety building stock and facilities to high standards of energy efficiency and renewable energy usage, thereby reducing fossil fuel usage, energy costs and greenhouse gas emissions. By supporting project structures that can be replicated, the Communities Energy Grant showcases retrofit project models that can be implemented without SEAI support in the future.

Appendix 3: Glossary

Term	Definition
Property upgrade	Refers to a retrofit at a property related to a single application on any of the SEAI residential retrofit programmes. The upgrade is counted as completed when a SEAI grant is fully paid, or on first payment of the 75% stage payment for fully funded energy upgrades (in these instances the works are complete). A property can have multiple property upgrades if they avail of SEAI grant programmes multiple times.
B2 or better home	A home counts as having achieved a B2 or better BER rating when a property upgrade achieves a post works BER rating of B2 or better. The 'B2' is allocated to the retrofit programme that first achieves the rating. Thus, a home will only be counted once as a B2 or better in all reporting context.
Heat Pump home	A home counts as a heat pump home when a property upgrade includes the installation of a heat pump. The home is allocated to the retrofit programme that installed a heat pump for the first time, regardless of subsequent energy upgrades on the same or other retrofit programmes where a replacement heat pump is installed. Thus, a home will only be counted once as a heat pump home in all reporting context.
Applications received	An application received for an energy upgrade for an individual home on any of the retrofit programmes. Multiple applications can be made for a home within or across programmes, depending on the specific rules on the programme. This is an indicator of demand for SEAI programmes. Not all applications will result in a property upgrade.
Capital Expenditure	Includes the grant expenditure plus overheads such as outsourced grant administration service costs, survey costs, inspection costs, and IT costs for supporting systems. All of the above expenditure is on a cash basis in line with Government accounting. SEAI's published annual report incorporating year-end financial statements is on an accruals basis in line with financial reporting standards.



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